APPENDIX

A. Glossary

Affordable Housing: a monthly housing cost to an individual or family that generally does not exceed 33% of gross monthly income

AFY (Acre Feet per Year): one acre foot is 43,560 cubic feet or approximately 325,851 US gallons

Alternative Transportation: modes of travel other than private cars, such as walking, bicycling, rollerblading, carpooling and transit

AMI (Area Median Income): localized area median incomes are calculated annually based on a surveys of comparably-sized homes within a metropolitan statistical area.

Aquifer Recharge: a hydrologic process where water moves downward from surface water to groundwater.

Biomass: a material produced by the growth of micro-organisms, plants or animals

Building Envelope: the exterior surface of a building's construction – its walls, windows, and doors; the building envelope is the skin, which prevents moisture, air, and heat from passing freely

Build-to-Line: a line within zoning regulations that requires the developer to build out to a certain point on the lot; this will ensure a consistent street-edge along certain streets

Carbon Footprint: describes the amount of carbon dioxide and other greenhouse emissions an individual uses

Community Gardens: a city-owned piece of property where citizens may grow and maintain plants and vegetables; this allows for community interaction between generations, education of environmental processes, and support of local foods resources

Co-housing: a type of residential community where a group of private homes share common facilities and engage in regular community events

Contour Interval: on a contour map, it is the difference in elevation between successive contour lines

"Dark Skies" protection: measures to control or eliminate light pollution by regulating outdoor night lighting

Density: in ecology, the number of individuals of a population per unit of living space

Design Standards: Detailed engineering drawings and/or specifications promulgated by public or private organizations that leave little choice to design engineers and technicians

Desertification: the gradual transformation of habitable land into desert; is usually caused by climate change or by destructive use of the land

Detention Pond: depressed landscaped areas used to detain storm water runoff during heavy rainstorms

DRC (Design Review Committee): a group of appointed citizens, whose job is to review and consider the design, form, and aesthetics of proposed buildings and developments

Dry Land Gardening: the use of drought tolerant plants to create low maintenance gardens

Early Neighborhood Notification: an ordinance of the city of Santa Fe that intends to create an "exchange of information between the prospective applicant and the affected neighborhood(s)" in order to utilize community to improve or alter the applicant's plan proposal

Easement: a right given to another person or entity to trespass upon land that person or entity does not own. For example, easements are used for roads, access to utility lines or for landlocked home owners to reach their home

Ecological Footprint: an equation that identifies the balance (or imbalance) of human consumption relative to resources available from the planet's ecosystems

Economic Development: the development of economic wealth of countries or regions for the well-being of their inhabitants

Ecoregion: a relatively large unit of land or water that is characterized by a distinctive climate, ecological features and plant and animal communities

Escarpment: a long, more or less continuous cliff or relatively steep slope facing in one direction

Escarpment Ordinance: a local city regulation which restricts building or excavation on ridgetops and hillsides above a certain grade

Fauna: a group of animals of a particular region or period

Feasibility Study: an evaluation of alternative remedial actions from a technical, environmental and cost perspective, recommending the most effective

Flood Plain: any land area susceptible to being inundated by floodwaters from any source

Flood Zone: an area in which the likelihood of a flood is much higher than average

Flora Vegetation: all the plant life in a particular region or period

Gravity Feed Sewer Line: a sewer line that uses the force of gravity to propel sewage through the pipes and to the sanitary sewer station

Graywater: waste water from all fixtures except toilets

Green Building: green building is the practice of increasing the efficiency with which buildings use resources while reducing building impacts on human health and the environment during the building's lifecycle, through better siting, design, construction, operation

Greenhouse Gases: gases in an atmosphere that absorb and emit radiation within the thermal infrared range

HERS (Home Energy Rating System Program): a standardized system for rating the energy-efficiency of residential buildings

Housing First: Housing for hard-to-serve persons including the homeless with disabilities

Hydrology: the study of the occurrence, distribution, and chemistry of all waters of the earth

Infill Development: refers to urban development taking place on a vacant or undeveloped site between other developments

Infiltration: the act or process of water entering the soil or other porous substances

Land Trust: an agreement whereby one party (the trustee) agrees to hold ownership of a piece of real property for the benefit of another party (the beneficiary). Land trusts are used by nonprofit organizations to hold conservation easements, by corporations and investment groups to compile large tracts of land, and by individuals to keep their real estate ownership private, avoid probate and provide several other benefits

Lift Station Wet Well: a wastewater treatment receiving well

Live-work Community: a community created from mixed-use zoning and developments, which enables the 24-hour use of an area through providing spaces for dwelling, recreating, and working.

Loam: soil composed of sand, silt, and clay in relatively even concentration (about 40-40-20% concentration respectively). Loam is considered ideal for gardening and agricultural uses: loam soils generally contain more nutrients and humus than sandy soils, have better infiltration and drainage than silty soils, and are easier to till than clay soil

Low Impact Development (LID): a stormwater management strategy concerned with maintaining or restoring the natural hydrologic functions of a site

Low Income Households: households whose income does not exceed 80% of the Area Median Income, adjusted for household size

Low Pressure Sewer System: low pressure/grinder pump systems utilize a small grinder pump station at each wastewater source and small-diameter, low pressure sewer for transmission either to a lift station or directly to a wastewater treatment plant

Market Rate Housing: households whose income falls above 150% of the Area Median Income, adjusted for household size

Massing: the overall bulk, size, physical volume, or magnitude of a structure or project

Master Plan: a document that describes, in narrative and with maps, an overall development concept including both present property uses as well as future land

Moderate Income Households: households whose income falls within 81% to 120% of the Area Median Income, adjusted for household size

Memorandum of Understanding (MOU): a document describing an agreement between parties and expresses a convergence of will between the parties, indicating an intended common line of action.

Multi-modal Station: a station that provides for the transfer and movement of passengers and cargo through more than one method of transport

MSL: mean sea level

Natural Preserve: a means of preserving rare and typical areas, species and geological elements, functional and representative natural environments

New Mexico Night Skies Ordinance: see "Dark Skies" protection

On-Site Signage: any signage placed on the property owned by the entity doing the advertising

Overlay Zoning: a regulatory tool that creates a special zoning district, placed over an existing base zone(s), which identifies special provisions in addition to those in the underlying base zone. The overlay district can share common boundaries with the base zone or cut across base zone boundaries. Regulations or incentives are attached to the overlay district to protect a specific resource or guide development within a special area

Passive Solar: a solar heating or cooling system that operates by using gravity, heat flows, or evaporation rather than mechanical devices to collect and transfer energy

Permeable Paving: a term used to describe paving methods for roads, parking lots and walkways that allow the movement of water and air around the paving material

Plat: a legally owned piece of land

Pocket Parks: the smallest park typology which provides the most immediate and approximate recreation facilities for sub-components of neighborhoods

Privacy / Party Walls: walls placed on or within the property to provide privacy and separation between homes or to provide screening of less desirable views. Privacy walls enclose private space and are attached to buildings. See Architectural Form + Style, Section C

Rain Garden: a planted depression that allows rainwater runoff from impervious urban areas

Rammed Earth: walls which are a mixture of soil and cement, compacted into form, usually around 2 feet thick

Rapidly Renewable Materials: resources that are replaced rapidly by natural processes

Regenerative Design: the proposed design approach that best reflects the thinking that will shape the next phase of development within the field of sustainable design

Relief Map: a three dimensional map that depicts the topography of the earth's surface

Renewable Energy: energy generated from natural resources, such as sunlight, wind, rain, tides and geothermal heat, which are renewable naturally replenished.

Retaining Walls: walls which structurally create transitions between grade changes, integrate grade changes, integrate buildings with their site and which minimize the impact of grading. See Landscape Architecture, Chapter Six

Ridge Line: the line or surface along the top of a ridge

Right-of-Way: a thoroughfare or path established for public use

Sanitary Sewer Lift Station: lift stations contain pumps, valves, and electrical equipment necessary to pump water or wastewater from a low elevation to a high elevation. For example, a sewage lift station is used to pump sewage or wastewater up hill from a low-lying neighborhood to a collection system of pipes

Savanna: a grassland dotted with trees, and occurs in several types of biomes. In savannas, grasses form the predominant vegetation type, usually mixed

Service Walls: walls which shield views to utilities of service units

SF: square feet

Slope: the grade of any physical feature such as a hill, stream, roof, railroad, or road, refers to the amount of inclination of that surface where zero indicates level (with respect to gravity) and larger numbers indicate higher degrees of "tilt"

Smart Growth: an urban planning and transportation theory that concentrates growth in the center of a city to avoid urban sprawl; and advocates compact, transit-oriented, walkable, bicycle-friendly land use, including neighborhood schools, complete streets, mixed-use development with a range of housing choices

Solar Access: defined as access to direct sunlight within the buildable area on a given lot between the hours of 10 am and 2 pm on December 21

Solar Orientation: the availability of direct sunlight to a structure or construction site

Split Face Block: a concrete block which has a rough, stone-like texture on one face

Step-Up Income Households: households whose income falls within 121% to 150% of the Area Median Income, adjusted for household size

Street Setbacks: the relationship between houses and the street

Successional Planting: a form of gardening that makes most efficient use of an area of land by the harvesting and replanting of a crop in order to maintain high yield. Here, successional planting refers to the replanting of trees and other vegetation as it matures so that there is a continuous growth and lush appearance of the planting area

Sustainable Design: sustainability is the capacity to maintain a certain process or state indefinitely. As applied to planning and design, sustainable design has been expressed as the planning of cities, communities, or landscapes in order to meet the needs of the present without compromising the ability of future generations to meet their own needs

Sustainable Development: as defined by the United Nations Commission of the Environment, sustainable development is: "The concept of meeting the needs of the present without compromising the ability of future generations to meet their needs." (Our Common Future (1987), The Bruntland Commission)

Sweat Equity: a term usually referring to physical work that is done to hold stake in a property or community

Tax Increment Financing (TIF): a public financing method which has been used for redevelopment and community improvement projects. TIF is a tool to use future gains in taxes to finance the current improvements that will create those gains

Transitional Housing: housing designed to link rental assistance to supportive services for hard-to-serve persons, including the homeless, with disabilities

USBGC LEED: U.S. Green Building Council Leadership in Energy and Environmental Design rating system

Understory Condition: the shrubs and smaller trees between the forest canopy and the ground cover

Urban Forestry: The management of tree resources in and around cities and towns

Viewshed: A viewshed is an area of land, water, and other environmental elements that is visible from a fixed vantage point

View Walls: walls which provide security but allow views through to open space or other amenities.

VOCs: volatile organic compounds

Water Budget: projected water requirements based on use and demand

Water Harvesting: Rainwater harvesting is the gathering, or accumulating and storing, of rainwater

Watershed: a region or area bounded peripherally by a divide and draining ultimately to a particular watercourse or body of water

Wildlife Corridors: linked segments of land that allows for un-interrupted movement of wildlife through their natural habitats; this will allow for natural migration patterns and greater inter- and intra- species interaction

Xeriscaping: a form of landscaping that does not require additional irrigation by utilizing native, drought-resistant plants.

Yard Walls: walls which stand apart from the building unit and provides privacy or security to the property

B. Legal Description

A certain parcel of land designated within Tract B; Tract D; Tract E; Tract F; and Tract G, lying and being situated within the Santa Fe Northwest Quadrant of the Santa Fe grant, within sections 11, 14, 15, 22 and 23, t. 17 N., r. 9 e., N.M.P.M. within City of Santa Fe, New Mexico. Being more particularly described as follows, to wit;

Beginning at the Santa Fe County Control No. SFC-51, thence N76°34'25"E, distance of 58.38 feet to the true point of beginning;

Thence from said point of beginning s61°36'11"W, a distance of 338.38 feet; thence S39°27'38"W, a distance of 689.10 feet; thence S39°11'58"W, a distance of 409.53 feet; thence S39°27'17"W, a distance of 266.27 feet; thence S40°43'19"E, a distance of 101.03 feet; thence S40°51'37"E, a distance of 49.65 feet; thence S40°54'26"E, a distance of 460.70 feet; thence S41°00'39"E, a distance of 239.73 feet; thence S64°44'51"W, a distance of 298.64 feet; thence S73°05'34"W, a distance of 180.80 feet; thence N23°53'03"W, a distance of 430.20 feet; thence S51°11'50"W, a distance of 371.15 feet; thence S52°18'02"W, a distance of 191.13 feet; thence S53°14'37"W, a distance of 598.63 feet; thence S16°50'50"E, a distance of 467.75 feet; thence S79°25'40"W, a distance of 319.96 feet; thence S42°12'37"W, a distance of 41.18 feet; thence N20°12'11"W, a distance of 165.88 feet; thence S14°28'25"W, a distance of 260.68 feet; thence S14°12'20"W, a distance of 245.77 feet; thence S11°56'46"W, a distance of 36.95 feet; thence N57°38'33"W, a distance of 1540.40 feet; thence N24°05'17"E, a distance of 659.12 feet to the beginning of a curve; thence northeasterly along said curve concave to the southeast, having a radius of 1500.00 feet, a central angle of 4°18'35" (chd N26°13'56"E, 112.80') and an arc distance of 112.83 feet; thence N28°23'34"E, a distance of 939.67 feet to the beginning of a curve; thence northeasterly along said curve concave to the southeast, having a radius of 300.00 feet, a central angle of 33°18'38" (chd N45°04'12"E, 171.97') and an arc distance of 174.41 feet; thence N61°38'34"E, a distance of 108.36 feet to the beginning of a curve; thence northeasterly and northerly along said curve concave to the northwest, having a radius of 250.00 feet, a central angle of 41°24'10" (chd N41°00'44"E, 176.75') and an arc distance of 180.65 feet; thence N20°18'43"E, a distance of 386.73 feet to the beginning of a curve; thence northerly along said curve concave to the west, having a radius of 500.00 feet, a central angle of 15°03'21" (chd N12°45'03"E, 131.01') and an arc distance of 131.39 feet; thence N05°16'56"E, a distance of 92.06 feet to the beginning of a curve; thence northerly and northeasterly along said curve concave to the southeast, having a radius of 350.00 feet, a central angle of 41°54'58" (chd N26°11'45"E, 250.38') and an arc distance of 256.05 feet; thence N47°09'47"E, a distance of 441.96 feet; thence N49°49'27"E, a distance of 460.43 feet to the beginning of a curve; thence northeasterly and easterly along said curve concave to the south, having a radius of 500.00 feet, a central angle of 39°05'26" (chd N69°22'32"E, 334.55') and an arc distance of 341.13 feet; thence N88°54'09"E, a distance of 164.67 feet to the beginning of a curve; thence easterly along said curve concave to the south, having a radius of 500.00 feet, a central angle of 21°37'54" (chd S82°05'14"E, 187.65') and an arc distance of 188.77 feet; thence S73°05'33"E, a distance of 281.94 feet; thence N15°19'07"E, a distance of 530.29 feet; thence N21°43'39"W, a distance of 208.65 feet to the beginning of a curve; thence northerly, northeasterly, easterly, southeasterly, southerly, southwesterly, westerly, northwesterly and northerly along said curve concave to the east, having a radius of 500.00 feet, a central angle of 29°34'12" (chd 06°55'18"W, 255.19') and an arc distance of 258.05 feet; thence N07°53'29"E, a distance of 101.37 feet to the beginning of a curve; thence northerly along said curve concave to the west, having a radius of 500.00 feet, a central angle of 6°33'58" (chd N04°29'59"E, 57.27') and an arc distance of 57.30 feet; thence N01°15'53"E, a distance of 257.81 feet to the beginning of a curve; thence northerly along said curve concave to the east, having a radius of 500.00 feet, a central angle of 13°28'33" (chd N08°06'06"E, 117.33') and an arc distance of 117.60 feet; thence N14°46'18"E, a distance of 453.37 feet; thence N09°28'43"E, a distance of 266.49 feet; thence N09°39'50"W, a distance of 153.93 feet; thence N46°53'44"W, a distance of 53.10 feet; thence N05°50'47"W, a distance of 478.51 feet to the beginning of a curve; thence easterly along said curve concave to the north, having a radius of 1682.39 feet, a central angle of 12°51'03" (chd N75°35'03"E, 376.55') and an arc distance of 377.34 feet to a point on a curve; thence easterly and northeasterly along said curve concave to the north, having a radius of 4025.72 feet, a central angle of 2°00'05" (chd N68°13'59"E, 140.62') and an arc distance of 140.62 feet; thence N67°05'59"E, a distance of 166.71 feet; thence S22°48'06"E, a distance of 94.38 feet; thence N57°25'57"E, a distance of 325.82 feet; thence N19°26'55"E, a distance of 154.29 feet to the beginning of a curve; thence northeasterly along said curve concave to the northwest, having a radius of 1295.92 feet, a central angle of 27°16'01" (chd N43°39'08"E, 610.92') and an arc distance of 616.73 feet; thence N29°51'27"E, a distance of

37.35 feet; thence s59°57’10”E, a distance of 149.86 feet; thence N30°02’12”E, a distance of 150.07 feet; thence N59°58’46”W, a distance of 194.62 feet to the beginning of a curve; thence northeasterly and northerly along said curve concave to the west, having a radius of 869.94 feet, a central angle of 21°32’14” (chd N16°45’31”E, 325.08’) and an arc distance of 327.01 feet; thence N06°21’46”E, a distance of 28.78 feet to the beginning of a curve; thence northerly along said curve concave to the east, having a radius of 1039.92 feet, a central angle of 12°41’03” (chd N12°17’29”E, 229.75’) and an arc distance of 230.22 feet; thence N18°56’20”E, a distance of 34.61 feet to the beginning of a curve; thence northerly and northeasterly along said curve concave to the southeast, having a radius of 2185.83 feet, a central angle of 11°19’39” (chd N24°20’18”E, 431.43’) and an arc distance of 432.14 feet; thence N30°01’16”E, a distance of 585.44 feet to the beginning of a curve; thence northeasterly along said curve concave to the southeast, having a radius of 1759.86 feet, a central angle of 12°30’26” (chd N36°17’56”E, 383.40’) and an arc distance of 384.16 feet; thence N42°29’50”E, a distance of 498.93 feet to the beginning of a curve; thence northeasterly and easterly along said curve concave to the southeast, having a radius of 1282.39 feet, a central angle of 33°47’54” (chd N59°24’28”E, 745.55’) and an arc distance of 756.47 feet to a point on a curve; thence easterly along said curve concave to the south, having a radius of 2185.83 feet, a central angle of 6°04’12” (chd N79°21’20”E, 231.46’) and an arc distance of 231.57 feet; thence S00°16’53”E, a distance of 1638.21 feet; thence S00°17’55”E, a distance of 869.03 feet; thence S00°21’35”E, a distance of 327.24 feet; thence S00°17’35”E, a distance of 371.10 feet; thence S00°15’13”E, a distance of 190.98 feet; thence S00°23’47”E, a distance of 37.87 feet; thence S00°22’55”E, a distance of 213.04 feet; thence S00°25’37”E, a distance of 177.97 feet; thence S00°16’20”E, a distance of 266.18 feet; thence S00°06’46”E, a distance of 315.78 feet; thence S02°52’47”E, a distance of 25.56 feet; thence S00°14’49”E, a distance of 376.39 feet; thence S00°11’21”E, a distance of 375.66 feet; thence S00°56’39”E, a distance of 655.59 feet; thence S89°44’03”W, a distance of 338.75 feet; thence S25°42’03”W, a distance of 342.23 feet; thence S00°09’18”E, a distance of 176.21 feet; thence S89°58’43”W, a distance of 2051.20 feet; thence N12°54’29”E, a distance of 1201.02 feet; thence S80°39’26”W, a distance of 74.37 feet; thence S64°48’35”W, a distance of 367.29 feet; thence S86°27’39”W, a distance of 341.41 feet; thence S87°49’24”W, a distance of 371.00 feet; thence S64°08’23”W, a distance of 232.70 feet; thence S04°29’49”W, a distance of 186.57 feet; thence S24°01’42”E, a distance of 580.65 feet; thence S24°01’54”E, a distance of 164.17 feet; thence S23°50’28”E, a distance of 600.13 feet; thence S57°02’37”E, a distance of 379.43 feet; thence S22°40’45”W, a distance of 277.15 feet to the said point and place of beginning. Containing 518.975 ac., more or less.

PARCEL A

A certain parcel of land designated as parcel A (School Site F), lying and being situate within Tract Ff of the Santa Fe Northwest Quadrant of the Santa Fe grant, within Proj. Sections 14, 15, T. 17 N., R. 9 E., N.M.P.M. within City of Santa Fe, New Mexico. Being more particularly described as follows, to wit;

Beginning at the Santa Fe County Control No. SFC-51, thence N21°11’44”W, distance of 1098.86 feet to the true point of beginning;

Thence from said point of beginning N24°01’54”W, a distance of 164.17 feet; thence N24°01’42”W, a distance of 580.65 feet; thence N04°29’49”E, a distance of 186.57 feet; thence N64°08’23”E, a distance of 232.70 feet; thence N87°49’24”E, a distance of 371.00 feet; thence N86°27’39”E, a distance of 341.41 feet; thence N64°48’35”E, a distance of 367.29 feet; thence N80°39’26”E, a distance of 74.37 feet; thence S12°54’29”W, a distance of 1201.02 feet; thence S89°57’02”W, a distance of 769.68 feet to the said point and place of beginning.

Containing 24.956 ac., more or less.

PARCEL B

Less and excepting the following parcels of land;

Board of education of the Santa Fe Public Schools, Exception 12, site being more particularly described as follows:

Beginning at the Santa Fe County Control No. SFC-51, thence N27°21’10”E, distance of 5028.40 feet to the true point of beginning;

Thence from said point of beginning S88°04’28”W, a distance of 874.40 feet; thence N14°08’42”W, a distance of 212.57 feet; thence N22°34’37”W, a distance of 394.11 feet; thence N75°48’54”E, a distance of 664.63

feet; thence S75°10’17”E, a distance of 539.73 feet; thence S15°31’32”W, a distance of 236.08 feet; thence S04°21’35”W, a distance of 338.90 feet to the said point and place of beginning.

Containing 15.007 ac., more or less.

Joe C & Jennie O Salazar parcel being more particularly described as follows:

Beginning at the Santa Fe County Control No. SFC-51, thence S43°36’34”W, distance of 3659.79 feet to the true point of beginning;

Thence from said point of beginning S09°36’49”W, a distance of 75.00 feet; thence S66°56’08”W, a distance of 162.47 feet; thence N40°27’47”W, a distance of 209.00 feet; thence N49°32’13”E, a distance of 155.04 feet; thence S55°49’04”E, a distance of 217.20 feet to the said point and place of beginning.

Containing 1.000 ac., more or less.

The net acreage for the land surveyed and described herein, contains 507.965 acres, more or less.

City of Santa Fe

HOUSING NEEDS ASSESSMENT

Table of Contents and Key Findings

May 2007

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City of Santa Fe
Office of Affordable Housing

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Section A – Key Findings and Recommendations

The City of Santa Fe has long recognized that disconnect exists between what local employees and residents can afford to pay for housing and what market prices demand in the city. As a result, several programs are already in place in Santa Fe, including but not limited to: an inclusionary zoning requirement that 30 percent of new residential development be set aside as affordable housing; provision of fee waivers and water for builders of affordable housing; several down payment assistance programs; rehabilitation loan programs; development of rental housing using Low Income Housing Tax Credits and established Section 8 programs and public housing assistance for extremely low-income residents. To date, the primary focus of these programs has been to provide housing assistance and opportunities to households earning less than 100 percent AMI in the community. While this continues to be a needed focus of programs, this research has also shown that there is a growing gap in housing for higher income households – those earning up to about 150 percent of the AMI ($79,200 for a family of two in Santa Fe in 2007). This stems largely from the continued growing gap between what locals can afford to pay for housing and what market prices demand in the city. For example, as of the end of 2006, the median sale price of a single-family home in the City of Santa Fe ($346,125) was almost 7 times higher than the median household income (about $50,000), whereas households can typically qualify to purchase homes that are priced between about 3 and 4 times their yearly income. This section highlights the primary gaps identified in the City of Santa Fe housing market as compared to local resident and employee incomes, trends leading to or stemming from these gaps, primary households affected and suggested program focus moving forward.

Ownership Housing Trends

The median household income of Santa Fe households increased by about 24 percent between 1999 ($40,392) and 2006 ($50,000), compared to an 80 percent increase in single-family home prices and a 38 percent increase in condominium/townhome sale prices in the City of Santa Fe.

The median price of single-family homes in 1999 ($191,875) was about 475 percent higher than the median household income ($40,392). The median price of single-family homes in 2006 ($346,125) was about 692 percent higher than the median household income ($50,000). Households can typically afford to purchase homes priced between about 300 and 400 percent higher than their household income, depending on the size of their down payment and other factors.

Conclusion:

Owner incomes have not been keeping pace with rising home prices. The gap between what local households can afford to pay for housing and what market prices demand has been increasing.

Availability of lower price homes on the general market (e.g., the MLS) is declining. About 33 percent of sales that occurred between July 1, 2005, through June 30, 2006, were priced under $250,000, compared to 17.5 percent of current MLS listings (March 28, 2007). About 55 percent of current listings are priced over $400,000 (which would be mostly affordable to local high-end buyers and the second homeowner market) compared to 36.3 percent of sales between July 1, 2005, through June 30, 2006.

Realtors supported that homes priced under $300,000 are scarce on the market, yet are the price points at which most locals can qualify and are looking to buy. Also, although the sales market for homes priced over $1,000,000 has been strong, they may be over-supplied at this time compared to historical sales of these properties.

Realtors and lenders noted that first time homebuyers and employees moving into the area who can only qualify for $175,000 to $250,000 have few choices – mostly small condominiums or houses in disrepair with high renovation costs. Employees who grew up in Santa Fe are moving out into the county or to Rio Rancho, where the median price

of single-family homes is around $240,000 and the commute takes 40 minutes. Survey responses from in-commuters to Santa Fe also support this conclusion.

Realtors and lenders both have a perception that owners will not be able to move up in housing upon purchasing an affordable unit – that they will not be able to make the leap from an affordable home to much more expensive market-rate units. Part of this perception stems from their confusion over how the equity-sharing program works upon resale of affordable units. However, continued rising home prices, decreased availability of market homes in the move-up price range ($200,000 to $350,000) and the increasing gap between what locals can afford and what the market provides also supports this concept.

Conclusions:

Competition for first-time homebuyer and move-up housing in the City of Santa Fe is increasing due to both a decline in available properties in affordable price ranges (between about $100,000 and $300,000) and continued high demand. Product available in these price ranges in the city are often too small for households that can afford them or they are in need of significant repair. Many households that can afford this price range seek housing outside of the city for a more suitable selection.

Households that own an affordable unit and that are ready to move up in housing will have a difficult time finding suitable product within the city that they can afford. The gap between affordable housing and market prices has continued to increase, making it difficult for buyers to fill this gap.

Rental Housing Trends

Average rents have increased about 37.9 percent between 1999 and 2006, from $639 as of the 2000 Census to $882 based on current Household Surveys. Renter incomes increased only 29 percent between the 2000 Census ($28,177) and current Household Surveys ($36,344).

Typically, vacancy rates around 5 percent suggest some equilibrium in the market, meaning that there is sufficient supply to provide renters with a choice of product. Vacancy rates below this threshold indicate under-supply, whereas rates above this level suggest over-supply of housing. Vacancy rates in Santa Fe have fluctuated between about 5.5 percent (in 2000) and 2.3 percent (in 2005) between 2000 and 2007. Current vacancy rates are reported to be relatively low at around 3.1 percent – 3.4 percent for market rate units and 2.4 percent for income-restricted/affordable units.

Purchase of properties for investment/rental purposes has been declining in large part due to quickly rising home sale prices and slower increases in rents, where current rents do not cover the purchase price of units. Where investment properties could be purchased in the $100,000 range in the 1990's and rented for $800 to $1,000 per month, home prices have escalated faster than rents such that similar investment properties now cost over $260,000 and claim similar $1,000 per month rents.

There are two housing authorities serving Santa Fe City and County. These two organizations provide 770 units of public housing, for which people pay 30 percent of income for rent and 726 Section 8 vouchers that people use for other units in the community; these residents also pay 30 percent of their income for rent. The housing authorities maintain wait lists for both their public housing and Section 8 voucher programs. The wait for either program is typically one to two years.

Conclusions:

The incomes of renters have not been keeping pace with rising rents. Rentals have become less affordable to local renter households since 2000.

Renters have little selection in the Santa Fe market with current (and historical) vacancy rates below 5 percent (3.4 percent for market rate rentals and 2.4 percent for income-restricted/affordable rentals in March 2007). The City and County housing authorities report waitlists of one to two years for their public housing rentals and Section 8 voucher programs.

Lenders and realtors have noted a decline in homes purchased for investment/rental properties in large part because rents received do not cover the mortgage associated with buying an investment property. Some current owners have also had increased problems with "bad" tenants and have opted to sell their properties. This results in fewer rentals available on the market through investment owner sources.

Second Homeowners/Retirees

About 16 percent of properties in the City of Santa Fe are owned by out-of-area owners (owners that do not have local city mailing addresses). This includes 31 percent of properties in the northeast quadrant, 23 percent in the southeast, 10 percent in the northwest and 8 percent in the southwest. Estimates from the 2000 Census indicate that second homeownership comprised closer to 10 percent of units in the city in 2000.

About 39 percent of condominiums in the city are owned by out-of-area owners, along with 12 percent of single-family homes.

An evaluation of current MLS listings by out-of-area ownership and local City of Santa Fe ownership shows that a similar percentage of out-of-area owners and locals own homes priced between $500,000 and $800,000 (24 percent each) and a slightly higher percentage of out-of-area owners own homes priced between $350,000 and $399,999 (9 percent) than locals (7 percent). This indicates that out-of-area interest in homes overlaps most with (or competes most with) locals at these price points. Properties priced between $350,000 and $399,999 would be potential move-up purchase opportunities for locals. About 51 percent of properties owned by out-of-area owners and that are currently for sale are priced over $800,000.

Realtors noted that between 30 to 35 percent are retirees and second/third home buyers. The number of retirees does *not* seem to be increasing though they are getting wealthier. Most of the second home buyers are empty nester couples in their 40's and 50's who are still working.

One lender indicated about 10 percent of his business each year is from retirees/second homeowners. Lenders have not noticed an increase in borrowing by retirees or second-home buyers. Of loans made to persons who are *not* residents are Santa Fe, most are for lots on which they plan to build a home for retirement. It was felt that many of the second homeowners/retirees either pay cash for their unit or use financing from non-local lenders with which they have a relationship

Conclusions:

Realtors and lenders have not noticed an increase in interest from out-of-area buyers, but realtors did note that out-of-area buyers/retirees are getting wealthier. Most of the second home buyers are empty-nester couples that are still working.

Out-of-area owners (second homeowners) are likely to seek properties in the northeast and southeast quadrants of Santa Fe and particularly units priced over $500,000. Primary overlap with the local market occurs for units priced between about $350,000 to $399,999, which higher income locals (over 200 percent AMI) could afford.

About 39 percent of condominiums in the city are owned by out-of-area owners compared to only 12 percent of single-family homes, indicating stronger relative demand for attached product than single-family units.

Commuting

About 55.8 percent of Santa Fe workers also live in the city. This represents a slight increase since the 2000 Census, when 51.1 percent of local employees lived in the city. In other words, in-commuting to jobs in the city has decreased.

About 83.9 percent of employed residents of Santa Fe also work in the city. This represents a slight decline since the 2000 Census, when 86.5 percent of employed residents worked in the city. In other words, out-commuting for jobs among residents has increased.

Interviews with realtors noted that most out-of-area buyers are empty-nester couples who are still working. These households have substantial incomes, but many will retain employment out of the area (and out of the state). This helps explain some of the increase in out-commuting noted above, where these buyers occupy their Santa Fe homes, but retain their outside employment.

Survey results show that households earning over 150 percent AMI were least likely to be working within the City of Santa Fe (75 percent) and most likely to be working outside of Santa Fe County (28 percent) than other income groups (note that the total percentage adds to over 100 percent because some workers are employed in multiple locations).

Conclusions:

With in-commuting for jobs decreasing, it is likely that the housing programs the city has in place has been assisting with local workers being able to find housing.

More residents of Santa Fe are employed outside of the city. This is likely related to a trend noted by realtors, where out-of-area buyers are largely still employed and retain their out-of-area employment upon occupying their residence.

Loss of Resident Workers

About 54 percent of in-commuters used to live in the City of Santa Fe. Evaluating their trends and characteristics shows the following:

- Of in-commuters that used to live in the city and that have been employed for between 5 and 10 years in Santa Fe, about 22.6 percent moved within the past year, compared to about 4 percent each of in-commuters that have been employed for less than 5 years or over 10 years. In other words, employees that have been working in Santa Fe for between 5 and 10 years are more likely than shorter-term or longer-term employees to be seeking housing outside of the area.

- The City of Santa Fe appears to be losing a higher percentage of their middle-income workers (earning between 100 and 150 percent AMI) and low-income workers (50 to 80 percent AMI) than workers at other income scales. This is evidenced by the fact that a much higher percentage of in-commuters that moved out of Santa Fe within the past 5 years earn between 100 and 150 percent AMI (35 percent) than resident workers (23 percent). Also, a somewhat higher percentage of in-commuters that moved out of Santa Fe within the past 5 years earn between 50 to 80 percent AMI (25 percent) than resident workers (19 percent).

- Home ownership is higher among in-commuters (87 percent) than resident workers (55 percent) or out-commuters (66 percent). In-commuters are also more likely to have children under 18 in their household (49 percent) compared to out-commuters (36 percent) and resident workers (31 percent).

Conclusions:

About 54 percent of in-commuters were one-time residents of the city that have largely moved to afford housing. The group that is most likely to move are households with children that have been employed in the city for at least five years and earn between about 100 and 150 percent AMI, followed by households earning between 50 and 80 percent AMI.

Resident households earning less than 50 percent AMI and over 150 percent AMI are more likely than other income groups to remain in the community. Households earning less than 50 percent AMI often have fewer housing options and resources to move and those earning over 150 percent AMI can generally afford and find suitable housing options in the city. A similar percentage of in-commuters that used to live in the city and current resident worker households earn between 80 and 100 percent AMI, indicating current ownership programs in the city may be helping to retain some of these households.

Employer Problems

About 54 percent of employers noted that the availability of affordable workforce housing is "one of the more serious problems" in the city and another 11 percent felt it is "the most critical problem." When asked to rate the level of difficulty that employees have in finding housing in the City of Santa Fe from a scale of "1-not a problem" to "5-major problem," employers felt that general labor/service (3.6 average), entry-level professionals (3.6 average), seasonal workers (3.6 average), retail/service clerks (3.5 average) and office support staff (3.4 average) had the most difficulty locating housing in the area. About 37 percent of employers felt that mid-management positions had a problem finding housing.

About 8 percent of available jobs in the city are currently not filled. "Lack of applicants" and "unqualified candidates" were the primary reasons given.

About 40 percent of employers noted that they had at least one employee leave over the past two years due to a lack of housing (13 percent), lack of transportation (7 percent), lack of day care (9 percent) and/or the cost of living is too high (36 percent). In other words, of just employers surveyed, about 333 workers left over the past two years because the cost of living was too high, representing a total of about 7.6 percent of jobs.

Employers were generally not willing to support housing for employees (45 percent) or were uncertain (47 percent). However, 69 percent would support city efforts to address workforce housing needs through affordable residential development on city-owned land, 67 percent would support partnerships with the city or non-profits to construct affordable units and 56 percent would support commercial development requirements to construct housing. A very high 58 percent of employers were aware of at least some of the city's affordable housing programs.

Conclusions:

Employers as a whole perceive housing and the cost of living in Santa Fe to be a problem for retaining and recruiting qualified employment. They are also supportive of city efforts to address housing through partnerships and regulations; however, they are generally not willing to assist in the provision of housing for workers in the community (although 47 percent were undecided on this statement).

Employers feel that primarily the lower income, less skilled labor has more difficulty locating housing in the community than higher-paid workers. However, the inability to find qualified, skilled labor and applicants for current jobs, the loss of 7.6 percent of their combined workforce due to the cost of living in the area and trends noted in the commuting section regarding a significant percentage of in-commuters leaving the community after 5 years of employment points to the adverse effects that housing and the cost of living is also having on more senior positions in the community.

Senior Households

Based on the 2007 surveys, 24 percent of households were headed by a senior, totaling about 7,318 households. Assuming that the demand for housing units to be occupied by households headed by a senior increases proportionately with the population, by 2015, seniors will demand an additional 675 housing units.

In total, 12 percent of all senior households want to buy a new or different home within the next two to three years (878 households). This includes 12 percent of current owners and 13 percent of current renters. Note that this estimate only includes seniors already residing in Santa Fe and does not include demand from in migration.

The most commonly cited reason for wanting to buy a different home is to find a smaller one. This finding is not surprising given that most seniors live in single-family houses (67 percent) and most have three or more bedrooms (55 percent). It confirms the conclusion that there are unmet market opportunities for smaller homes designed to serve seniors.

Of the senior households who want to buy a new or different home in the next two to three years, 55 percent make more than 100 percent AMI. Additionally, 42 percent can afford $100,000 or more for a down payment, where the median down payment seniors have available is about $188,817.

It was felt by realtors that none of the developers in Santa Fe are specifically trying to target the retiree market with single-story designs and low maintenance yards. Retirees can find much more affordable product that meets their design needs in Albuquerque.

Conclusion:

The owner housing market is not specifically targeting housing for seniors with smaller, ranch-style housing that seniors looking to down-size will be seeking. Resident senior headed households are expected to demand an additional 657 housing units by 2015, not including in-migration of seniors. Senior households presently looking to buy will be seeking housing priced primarily between $200,000 and $400,000 based on income, down payment availability and willingness to pay (as reported on the 2007 Household Surveys).

Nearly half (48 percent) of senior households had incomes less than 80 percent AMI in 2007. One-third have incomes under $30,000 per year. Approximately 2,854 households (39 percent) pay more than they can afford for housing (e.g. are cost-burdened). About 49 percent of seniors who rent spend more than 30 percent of their income on their housing payment and are, therefore, considered to be cost burdened. This equates to about 820 senior-headed renter households that are cost-burdened.

Nearly one-fourth of Santa Fe's senior households include at least one person with a disability. This equates to approximately 1,698 households. Renter households are slightly more likely than owners to have a member with a disability. Although most senior households with a disabled member report that their housing now adequately accommodates their disabilities, 13 percent overall and 22 percent of renters indicate that it does not. This equates to approximately 221 households with disabilities and inadequate housing.

Households with at least one member age 65 or older were asked to indicate how likely they would be to use five types of housing services. Senior households were most interested in rental housing with services (congregate or assisted living), receiving assistance to make current housing more accessible and living in a community solely for persons age 65 or older, all of which received an average rating of 2.7 on a scale from "1-would not use" to "5-definitely would use." About 20 percent of seniors would consider each of these three options. There is less interest in affordable rental housing (16 percent would consider) and reverse mortgages (10 percent would consider) than other types of housing assistance typically provided for seniors (10 percent would consider the program).

While only about 16 percent of seniors as a whole would consider affordable rental housing, 45 percent of seniors that currently rent would consider affordable rental housing. Also, about 64 percent of seniors looking to purchase a new or different home in the City of Santa Fe would consider buying an affordable residence through the equity-sharing program.

Conclusions:

A large percentage of seniors who rent are cost-burdened by their housing payment (about 49 percent or 820 households). About 221 senior-headed households have at least one person with a disability and are in housing that does not adequately accommodate their needs. These are households that would be in current need of assistance in the community.

About 20 percent of senior households would be interested in rental housing with services, receiving assistance to make current housing more accessible and living in a community solely for persons age 65 and over. Another 10 percent would consider reverse mortgages. About 45 percent of seniors that currently rent would consider affordable rental housing and 64 percent of seniors wanting to buy a new or different home in the city would consider buying an affordable residence through the equity-sharing program. These programs and others could assist the above-mentioned cost-burdened households and households with disabilities, in addition to other seniors in need.

Use of Services and Home Ratings

Households earning 50 percent or less AMI were most likely to consider using "monthly rent assistance" (62 percent) and a "low interest home improvement loan" (69 percent) than other income groups. These households were also most likely to be renting their homes (63 percent) and were most likely to have a senior (age 65 or older) in their household (38 percent).

"A home you could own, built with sweat equity" would be considered by the highest percentage of households earning between 100.1 to 120 percent AMI (65 percent) and 120.1 to 150 percent AMI (60 percent) than other income groups, followed by 80.1 to 100 percent AMI households (55 percent).

Households most likely to consider using "down payment assistance" earn 50 percent or less AMI (68 percent) or between 50.1 to 80 percent AMI (57 percent), followed by households earning between 120.1 to 150 percent AMI (46 percent) and those earning between 100.1 to 120 percent AMI (40 percent).

Households earning 50 percent or less AMI were likely to rate certain characteristics of where they live (condition of home, exterior appearance, adequacy of heating, safety/security, quality of neighborhood, distance form work) lower than higher income households, with households earning over 150 percent AMI generally rating their home highest in most aspects. One exception is the "quality of schools." Households earning between 100.1 and 120 percent AMI (rated 2.6 average on a scale from "1-poor" to "5-excellent") and over 150 percent AMI (rated 2.6 average) were least satisfied with schools compared to other income groups. Average ratings from other income groups ranged between 3.0 and 3.2.

Although sample sizes are small, of survey respondents with children or expecting to have children within five (5) years, households earning between 80.1 and 100 percent AMI (2.3 average), 100.1 to 120 percent AMI (2.6 average) and over 150 percent AMI (2.5 average) were least satisfied with the "quality of schools" in the city of other income groups (rated on a scale from "1-poor" to "5-excellent). The "quality of schools" is also rated as a very important location factor to households earning less than 120 percent AMI that have children or are expecting to have children, with average ratings between 4.2 and 4.4 given a scale from "1-not at all important" to "5-extremely important."

Conclusions:

The relatively high percentage of households earning between 100.1 and 150 percent AMI that would consider sweat equity ownership and down-payment assistance speaks to some of the findings in this assessment that these households are having increasing difficulty finding and affording homes in the city. The high percentage of households earning under 80 percent AMI that would use down payment assistance reinforces the continued need among these households.

The quality of schools in the City of Santa Fe were rated lowest by households with children or expecting to have children that are earning in the 80.1 to 120 percent AMI range and earning over 150 percent AMI. The quality of schools is also a very important location consideration for households with children or expecting to have children that are earning under 120 percent AMI, likely contributing to the loss of these households in the city.

Housing Gaps

Section 8 – Gaps in Housing is a primary conclusion piece of this report. Rather than reiterate the data and tables in this section, only the primary conclusions are presented. It is recommended that Section 8 – Gaps in Housing be referenced for more detail regarding the below conclusions.

Ownership Gap Conclusions:

The most significant gaps between housing supply and housing need occurred, in descending order, for the following income groups: 60 to 80 percent AMI, 80.1 to 100 percent AMI, 100.1 to 120 percent AMI, 120.1 to 150 percent AMI and 50.1 to 60 percent AMI.

Ownership housing programs should continue to focus on the low- and middle-income range between 50 and 100 percent AMI, with the most need occurring between 60 and 100 percent AMI. These are programs that largely serve current residents and help them get established in the community with first-time ownership.

There is a growing gap for housing priced affordable for locals and in-commuters earning between 100 and 150 percent AMI. These would be homes priced between about $180,000 and $250,000 for a 2-person household. This segment comprises a significant percentage of local workers that recently moved out of the city to find more affordable housing (35 percent) and comprises a significant portion of families. Providing housing in middle- and upper-income ranges will assist with both retaining higher income family households in the city and more tenured workers seeking housing within these price ranges. This was also the primary income range at which realtors noted residents had difficulty locating housing and began searching outside the area for suitable and affordable units. Finally, this would help fill some realtor and lender concern that current programs will not permit first-time affordable housing buyers to move-up in the community by not being able to fill the growing gap between affordable housing prices and market-rate homes.

Because affordability to the 100 percent AMI income group begins to overlap with units supplied by the market, this can complicate serving this income group with affordable, equity-shared housing. While all income ranges expressed strong interest in purchasing affordable homes offered through the equity-sharing program in the city (including about 88 percent of households earning over 100 percent AMI), housing programs are generally designed to supplement the market rather than compete with it. Programs offering developer incentives, for example, to encourage housing development at price points within the 100 to 150 percent AMI could help meet demand at these price points.

Rental Gap Conclusions:

Current rents in the city average about $882 per month, which is generally affordable to a 2-person household earning about 65 percent of the AMI. Comparing incomes of renters needing and demanding housing to the distribution of existing units shows a primary gap in the provision of housing for renters earning less than 30 percent AMI and between 30 and 50 percent AMI.

To catch-up with current rental needs, about 47 units would be demanded by persons in-commuting to jobs in the city (city, county and school district employees only) and another 759 units would be needed to relieve existing renters in either overcrowded or substandard units. About 41 percent of these units will need to be priced for households earning less than 50 percent AMI, or about 331 total units.

To keep-up with new job growth in the city, about 739 rentals will be needed by 2012 and another 292 units between 2012 and 2015. About 28 percent of these units will need to be priced for households earning below 50 percent AMI, or about 285 units by 2015.

Programs and Opportunities

As noted above, the City of Santa Fe has several housing programs already in place. This section suggests potential applications of programs to assist with the housing needs and gaps of residents and workers in the city.

- Rentals. More units affordable to households earning less than 50 percent of the AMI are needed to meet current and future housing needs of residents and employees in Santa Fe. In addition to Low Income Housing Tax Credit opportunities, explore ways to increase housing options and assistance for households in this income category. To achieve low enough rents, significant subsidy and possible development incentives (including deferral of fees) will be required. Mixed income developments will mitigate the perception of "low-income" housing projects and will increase options for low-income residents. Housing market studies supporting demand for units at 50 percent AMI and below price points helps incentivize developers to provide these units by showing they will be occupied. In addition, providing funding in the form of grants to developers for units priced affordable

to households earning 50 percent AMI or below using available funds from a cash-in-lieu program or other source can also help produce units.

About 18 percent of renters are households headed by a person age 65 or older. About 45 percent of these households indicated they would definitely consider residing in affordable rental housing; 28 percent would definitely consider rental housing that includes services such as meals, transportation and activities; and 33 percent would definitely consider residing in a community that is solely for persons age 65 or older.

- Housing for Local Residents and Workers. Current ownership housing programs focus on households earning less than 100 percent AMI. Gaps were noted in higher income ranges (up to 150 percent AMI) with evidence that the city is losing many families, tenured and skilled workers seeking housing priced between about $200,000 and $300,000. Market-rate housing, particularly in the southwest area of the city, overlaps with these price points, creating an additional challenge for programs targeting these households. Explore additional developer incentives and fee waivers that may assist developers in providing more market housing in these price ranges.

  Employers noted strong support of city initiatives to develop workforce housing on city-owned land; to work in partnerships to create housing and for regulations on commercial development to provide housing.

  Habitat for Humanity has built 55 homes since 1987 and will complete an additional seven homes in 2007. Families contribute to the building of their homes through 500 hours of "sweat equity." About 37 percent of local owners and 64 percent of renters would definitely consider this type of program.

- Unit Conversion. Few opportunities remain for condo conversions in Santa Fe, where an estimated 500 to 1,000 units were converted between 1998 and 2003 in the city. Explore the potential for smaller conversion projects (older multi-family rental units, etc.). With interest in condominiums and attached product from second homeowners, care should be taken that converted units are sold to locals. This option will help increase ownership opportunities and will also encourage upgrading of older rental properties.

- Fixer-Upper and Rehabilitation Programs. Continue low-interest home improvement loan programs and consider expanding promotion of these loans. Also consider remodel/sweat equity assistance to both existing residents (to allow them to make needed improvements to their homes) and to new buyers (to allow them to make needed improvements to older, existing homes upon purchase). Forty-nine percent of current owners and 63 percent of current renters expressed interest in home improvement loans. Explore options to encourage landlords to upgrade and maintain properties to increase quality of older rental properties.

  In tandem with creating a program to encourage buyers to purchase homes in need of repair, also explore a program that would produce smaller, more maintenance free homes for older adults to purchase. In turn, the program could acquire the homes of seniors moving into the newer or remodeled units. These homes could be renovated by the entity acquiring them or sold to new buyers who might also receive favorable financing to make needed improvements.

- Down Payment Assistance. Opportunities for higher income households (e.g. earning 100 percent AMI) to take advantage of existing down-payment assistance programs should be explored – 69 percent of current renters and 24 percent of current owners expressed interest in this type of program. There is a need to expand awareness of down payment programs available to households earning over 80 percent AMI and potentially expand the availability of funds to higher income groups. With the growing gap in affordability, there is a need for assisting higher income households in addition to households earning less than 80 percent AMI. Over one-half of households earning less than 80 percent AMI and about 40 to 45 percent of households earning between 100.1 and 150 percent AMI expressed interest in down payment assistance.

- Plan for Residential Growth/Demand. Recognize that as more people move to the city, the demand for services, such as schools, day care, transportation and shopping, will increase. This will, in turn, create additional demand for housing from the employees needed to provide these services. It will be important for the city to plan for, encourage and support more affordable housing development as a result of this demand. Precedent has been set with the 30 percent inclusionary zoning program, Tierra Contenta master planned community and the current undertaking in the northwest quadrant for a second master planned community. The challenge will be to ensure a mix of housing for all incomes is provided to maintain a balanced and diverse community.

- Reverse Annuity Mortgage. Work with local lenders to expand and implement Reverse Annuity Mortgage Programs for seniors that own their homes. These programs allow older adults access to the equity in their home for living expenses and can enhance their ability to remain in their homes and make needed repairs. About 11 percent of seniors that own their homes indicated interest in participating in this type of program.

- Partnerships. Continue public/private partnerships as a means to achieve identified housing goals. Through such partnerships, housing that is more affordable can be achieved with enhanced financing options, assuring that a portion of the housing that is created is for residents of the City of Santa Fe and that there will not be a dependence on-going subsidy, such as Section 8 Rental Subsidy. In other words, permanently affordable units can be introduced into the area that will retain affordability over time without on-going financial resources.

- Housing for Special Populations. This includes opportunities for seniors, developmentally and physically disabled, large families, single parents, the homeless or near homeless and ex-offenders. Various program strategies can be implemented, including property tax abatement for lower income home owners, developing more group homes or shared living for the disabled, increasing emergency shelter options and offering transitional housing. Continue programs that combine housing assistance with job training, education and day care for single parent households. All of these programs will address housing and social needs for Santa Fe residents who encounter multiple obstacles when trying to improve their living situation. Specific recommendations on special population needs as concluded from local service agency interviews include the following:

    - Provide more rental apartments affordable to very low (30 to 50 percent AMI) and extremely low-income (below 30 percent AMI) households. The wait lists for existing units are currently very long. A variety of housing types and unit sizes are needed in recognition that every household type will need a different type of housing;

    - More shelter and homeless beds are needed, as demonstrated by the point-in time results – 85 beds available for 540 people who need beds each night;

    - There were many service providers who felt that a "housing first" model was most appropriate with respect to providing permanent housing with supportive services. In this model, people are given permanent housing as a first step and then intensive case management is brought to help the households stay in permanent housing and address other issues such as addiction, mental and physical health challenges and lack of employment;

    - There is a lack of housing for purchase for people below 65 percent of the AMI. These units must be very affordably priced in order for people at this level of AMI to afford the monthly payments. These homes need to be priced in the range of $100,000 to $150,000;

    - There are a declining number of resale houses that are available below $250,000, indicating a loss of affordable housing stock. This was also supported by realtor, lender and developer interviews;

- Prevention of homelessness was emphasized by several people who were interviewed. Foreclosure prevention and assistance with rental payments were seen as important services that could be expanded in the community; and

- Some recommendations to best achieve identified needs include:

  - Better coordination among the multiple agencies working on homeless housing and services would assist the agencies in identifying gaps and overlaps in services. A funding source might be a dedicated sales tax like the one in Albuquerque that funds public safety, including homeless services. The Mayor's Blue Ribbon Panel on Homelessness has begun to address this issue through one of their subcommittees.

  - Better coordination of non-profits working on affordable for sale housing. In some cities, there is a common data base maintained by the city that lists all available new and resale affordable housing, which is an idea that the City of Santa Fe and/or its non-profits might consider. Realtors noted they are confused by the variety of ways that affordable homeownership is being achieved. They suggest that a uniform approach be utilized that everyone can understand.

  - Finally, lenders felt homebuyer counseling and education services are fragmented and under utilized. Services need to be expanded. Suggested improvements include offering courses with more schedule options and tailoring course content to meet wide-ranging needs. Some borrowers must complete homebuyer courses to qualify for loans even if they have previously owned a home or completed a course elsewhere. Mini courses are needed in addition to more in-depth training for first-time buyers. Coordination and consolidation of these programs could also help with the confusion and overlap.

D. Homeowner's Association Draft

DRAFT

Declaration of Covenants, Conditions and Restrictions
Northwest Quadrant
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Article

E. Santa Fe Public Schools Projected Enrollment Calculation

THE SANTA FE PUBLIC SCHOOLS

Project Referral Comments

Date: June 26, 2007

Project Name: Northwest Quadrant

Location: Hwy 599

Status: ODP – Overall Development Plan

Owner/Agent: City of Santa Fe/Santa Fe Public Schools- Design Workshop

Prepared By: Santa Fe Public Schools

Mix and Number of Units	
Types of Units	Number of Units
227 – 2 bedroom – 30% 296 – 3 bedroom - 40% 227– 4 bedroom – 30% Proposed 2-5 year planning Proposed 7-8 year build out @ 90unit/yr Total build out 2017-2021	17 - Multi-family (transitional) – 2% 273 - Townhome/Apartments - 36% 150 – Single Family Attached – 20% 310 – Single Family Detached – 42%
750 Total	750 Total

Dwelling Units	Elementary Students	Middle Students	High School Students
17 MF	3	1	1
273 TH/Apt	63	38	33
150 SFA	34	21	18
310 SFD	133	81	81
750 Units			

Total Students	233 Elementary	141 Middle	133 High School

Currently students from this proposed development will attend the following schools:

Gonzales Elementary – 851 West Alameda, Santa Fe
Alameda Middle School – 450 La Madera Street, Santa Fe
Capital High School – 4851 Paseo del Sol, Santa Fe

These school assignments are subject to change in accordance with applicable SFPS and Board of Education policies and procedures.

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June 26, 2007
Project Referral Comments
Northwest Quadrant

The capacities and enrollments for these schools are:

Schools	Enrollment	Program Capacity with portables	Program Capacity without portables
Gonzales	364	462	440
Alameda	289	565	565
Capital High	1139	1418	1338

The enrollment numbers based on 06-07 40th day count (ARC)
The capacity for Gonzales was calculated effective 5/07 (SFPS) and this capacity may be changed with a possible configuration to K-8
The capacity for Alameda and Capital High was calculated effective 06/07 (ARC)
Program capacity is based on current programs at each school

School District Planning Comments:

Given the estimated build out projections for the Northwest Quadrant development plan, current capacities, without portables, at all schools indicate adequate capacity at the currently assigned schools. The Board of Education is considering a grade configuration change for Gonzales to a K-8 school.

It is anticipated that there will be a need to provide additional capital improvements at all assigned schools to meet the housing needs for the anticipated student population from this development.

There may be additional residential housing projects currently planned or in the development phase that may affect future capacities in this area. The School District reserves the option to consider future school site requirements in this area in accordance with City planning agreements.

Respectfully submitted,

Kathy Tully
Santa Fe Public Schools

/kat
Xc: Bobbie Gutierrez

F. Sustainability Matrix + Water Conservation Measures

					Indicator Source
ENVIRONMENT					
Guiding Principles	Goals	Guideline	DS - location		
Preserving and enhancing existing natural resources and site elements will dictate community form and identity.	Preserve Existing Natural Resources:	Preserve Cultural Resources: Meet or exceed state requirements for mitigating archaeological sites and cultural resources. Incorporate educational information and/or protection plans for cultural resources into the open space system.			
		Open Space Preservation: Preserve at least 50% of land area for open space, trails and parks.			
		Site Selection: Select sites for development to preserve existing major drainage arroyos, FEMA flood zones, natural resources and existing vegetation to the greatest extent possible.			
		Land Based Development: Use natural topography as a driver for the design of the development.			
		Compact Development: Achieve average minimum densities to meet or exceed: 6 units per acre for detached/semi-detached; 10 units for town homes; and 15 for apartments.	II-D-(1, 2, 3) Community Planning/ Neighborhood Form/ (Setbacks, Height, Density)		Green Communities Checklist
		Minimize Site Disturbance: Minimize disturbed area of site if site is greater than .33 acres by platting a building envelop and installing construction fencing along the perimeter of the envelope.			
		Topsoil Reuse: Save topsoil during construction and reuse.			
		Parking Footprint Reduction: Reduce the footprint of parking by providing shared parking opportunities.			
		Environmental Assessment: Conduct a Phase 1 Environmental Site Assessment and additional assessments of required, then provide a plan for abatement of any hazards.			
		Erosion Control: Install erosion control fencing to prevent erosion from site construction. Implement EPA's Best Management Practices for erosion and sedimentation control during construction.			

		Protect the Night Sky: Lighting standards meet Illuminating Engineering Society of North America (IESNA) standards and the New Mexico Night Sky Ordinance.	II-E-5 Community Planning/Character/Lighting V-A-15 Architecture/ Character/ Lighting VI-C-2 Landscape Architecture/ Parks, Open Space & Trails/ Lighting & Safety	
	Enhance Existing Natural Resources:	Revegetate Disturbed Areas: Develop a revegetation and reseeding program with native plants to restore post-development disturbed areas and minimize erosion.		
		Provide Wildlife Corridors and Habitat: Enhance existing drainageways with native planting for wildlife habitat. Provide contiguous areas of open space habitat for free movement of wildlife. Increase the number and distribution of indicator species through habitat enhancement.		
	Resource Management:	Resource Management Plan: Dedicate open space areas to a conservation trust for preservation and management. Develop an urban wildlife management plan to protect the flora and fauna of the site for environmental benefits and aesthetic enjoyment.		
	Natural Resource Education:	Develop resident handbooks and user guides that inform them about their environment.	I-(D,E,F,H) Introduction, (Guiding Principles, Sustainable Development, Management, Community Goals and Indicators)	DWI metrics
		Education Program: Provide educational signage and/or instructional programs to educate the public about natural resources.		
		Prohibited Plants: Provide a list of prohibited species and cultivars (see Table 6-3).		DWI metrics
Providing public space and access with an integrated trail system will bring value to the entire City and contribute to a high quality of life for residents.	Public Space: Preserve major amounts of open space and parkland and include an interconnecting trail system	Open Space Area: The area of contiguous open space with trail connections as a percentage of the entire development meets or exceeds 50%.	II-C-(4,5,6,11) Community Planning/ Networks/ (Bike Lanes, Sidewalks, Trails, Public Space) II-E-9 Community Planning/ Character/ Landscape	
		Quality of Public Space: Provide a range of different active and passive open space zones: natural preserve, enhanced open space, pocket parks, community parks and plazas, community gardens. (see Figure 6-3).		

	Access to Public Space:	Pedestrian + Bike Trail System: Provide an interconnected trail system that connects to public spaces, connects the communities within the Northwest Quadrant, and connects to major trail systems on the perimeter of the property (see Figure 3-6).		
		Limit Block Perimeters: Block perimeters should not exceed 1000 ft unless broken by a greenway and pedestrian path.		
		Restricted Vehicles: Designate trails for use by pedestrians and bicycles. Post signs and provide barriers to prevent the use of ATVs and motorized vehicles on the trail system.		
	Parks:	Park Size: .5 acres of park space per 200 units or .5 acres of park space per 100 residents – whichever is greater.	II-E-(4,9) Community Character/ Character/ (Recreation, Landscape)	Permaculture Institute of America
		Park Location: all residents should be within 1/4 mile walking radius of a park connected by a trail system.		
Sustainable and green building implementation will minimize the community's impact to the environment and enhance residents' sense of pride in their community.	Green Building: Construct a minimum of 80% of buildings in each phase that follow the LEED for Homes standards and are Energy Star certified.	Funding Sources: Provide information on and assistance in obtaining grants and funding to help subsidize green building.	II-B-3 Community Planning/ Resource Management/ Energy V-A-(1,2,3,4) Architecture/ Resource Management/ (Landscape/ Water/ Energy/ Materials)	
		Incentives: Provide city rebates and/or accelerated approvals for green building projects.	I-D Introduction/ Guiding Principles	Green Communities Checklist
		Low VOC Materials: Use materials with low VOCs.		
		Interior Finishes: Carpet installation is prohibited; use natural renewable materials.		
	Construction Material Reuse and Conservation:	Recyled Materials: Utilize salvaged and recycled materials as much as possible in balance with the economic viability of the project.	II-B-(1,2,3,4) Community Character/ Resource Management/ (Landscape, Water, Energy, Materials) VI-A-(1,2,3,4) Landscape Architecture, Resource Management, (Landscape, Water, Energy, Materials)	

		Environmentally Preferable Products: Use at least 50 percent (by cost or value) wood products and materials that are certified in accordance with the Forest Stewardship Council, salvaged wood, or engineered framing materials.		
		Local Materials: Use materials that have been extracted, recovered, assembled or manufactured within 500 miles of the project site.		
Energy conservation and generation will make the community less reliant on the grid and contribute to a sustainable community identify.	Energy Independence: Utilize energy efficient design; incorporate sustainable features that will make the development independent from, or at least less reliant on, existing high energy consuming technologies.	Passive Solar Design: Orient building to make the greatest use of passive solar heating and cooling.	V-A-4 Architecture, Resource Management, Materials	Green Communities Checklist
		Passive Solar Mitigation: With a less desirable building orientation, select drought tolerant trees and plants that are appropriate to the site's soils and microclimate and locate to provide shading in the summer and allow for heat gain in the winter.		Green Communities Checklist
		Active Solar: Make all residences 'solar ready' by providing sleeving through the roof to the mechanical room and PV panel supports for future PV panel installation.	II-D-(4-5) Community Planning/ Neighborhood Form/ (Orientation, Topography) V-B-(1,2,3,5,7,9,10,11,13,14,15,16) Architecture, Character, (Roofs, Sytle, Deck, Portals, Windows and Doors, Screens and Shades, Materials, Walls and Fences, Mechanical and Solar Systems, Screening, Lighting, Color)	Green Communities Checklist
		Renewable Energy: Utilize solar preheat, ground source heat pump and other energy efficient strategies for at least 10% of building energy use.		Green Communities Checklist
		Green Energy: Subscribe to centralized electric systems with at least 90% renewable energy sources.		
		Passive Hot Water Heating: Use passive solar hot water heaters.		
	Energy Efficiency: Percent reduction of energy consumption per capita in btu/ day from baseline	Efficient Lighting: Install flourescent or LED lights for 80% of all interior lights. Install daylight sensors or timers on all outdoor lighting.	I-(D,E,F) Introduction, (Guiding Principles, Sustainable Development, Management)	

		Minimize Light Pollution: Minimize light pollution on all exterior fixtures by following the New Mexico Night Skies Ordinance.	V-A-(1,2,3,4) Architecture, Resource Management, (Landscape, Water, Energy, Materials) II-E-5 Community Planning/ Character/ Lighting II-C-9 Community Planning, Networks, Utilities VI-A-3 Landscape Architecture, Resource Management, Energy	
		Appliances: Install high-efficiency Energy Star Rated appliances and electrical equipment to reduce energy needs and meet the required energy budget.		
		Energy Budget: Establish an energy budget for the project for less than ASHRAE 90.1 or local energy codes – whichever is more stringent.	V-A-(2,3,4) Architecture, Resource Management, (Water, Energy, Materials)	DWI metrics
	Reduce heat island effect: No net increase of localized ambient air temperatures pre and post development.	Green Roofs: Use Energy Star-compliant and high-emissive roofing and/or, install a "green" (vegetated) roof for at least 50 percent of the roof area; or a combination of high-albedo and vegetated roof covering 75 percent of the roof area.	V-B-1 Architecture/Character/ Roofs V-A-(3-4) Architecture/ Resource Management/ (Energy/ Materials)	Green Communities Checklist
		Shade Trees: Locate and plant shade trees to shade 50% of hardscape areas.		
		Hardscape Material Selection: Use light-colored/high-albedo materials and/or an open-grid pavement with a minimum Solar Reflective Index of 0.6 over at least 30 percent of the site's hardscaped area.	II-C-(2,3,4,5,6,7,8,11) Community Planning, Networks, (Streets, Bus Stops, Bike Lanes, Sidewalks, Trails, Parking, Driveways, Public Space V-B-(1,3,5,6,10,16) Architecture, Character, Roofs, Decks, Portals, Garages, Materials, Color VI-C-3 Landscape Architecture/ Parks, Open Space and Trails, Parking	
A water conservation and reuse strategy will ensure the project's viability and sustainability long-term.	Water Conservation: Target water use of 0.15 acre-feet per home per year	Fixtures: Install water-conserving fixtures with the following minimum specifications: toilets – 1.6 gallons per flush; showerheads – 2.0 gpm; kitchen faucets – 2.0 gpm; bathroom faucets – 2.0 gpm.	II-B-2 Community Planning, Resource Management, Water	Boston Ranch goals
		Appliances: Install Energy Star Rated front-loaded washing machines and dishwashers with a maximum water use of (check LEED)		

		Irrigation Water: Use at least 80% of water for irrigation from non-potable source (rain water catchment, effluent, or recycled gray water)	II-B-2 Community Planning, Resource Management, Water II-D-E Community Planning, Neighborhood Form, Topography II-C-10 Community Planning , Networks, Drainage II-E-9 Community Planning, Character, Landscape VI-C-5 Landscape Architecture, Parks, Open Space and Trails, Soil and Drainage VII-A Grading and Drainage, Resource Management	Green Communities Checklist
		Irrigation System: Install drip irrigation systems with rain sensing controls.		DWI metrics
		Plant material: Use drought tolerant plants (see plant list in appendix), limit cool season turf area to 600 sf maximum per dwelling unit, in fringe public open space areas install drought tolerant plants so once established within 5 years there is no permanent irrigation.	VI-A-2 Landscape Architecture, Resource Management, Water VI-B-(1,2,3,4) Landscape Architecture, Character, (Plant Zones, Plant Guidelines, Plant Palette, Xeriscaping)	DWI metrics
		Non-Potable Water for Toilet Flushing: Use centrally collected rain water from roofs for building sewage conveyance with a potable backup.		
	Water Collection (On-Lot): Collect or allow infiltration of at least 80% of rainwater that falls on lot.	Water Catchment: Install drain pipes from all building downspouts to collect in community water storage tanks for reuse for on-lot irrigation and toilet flushing.	VI-A-2 Landscape Architecture, Resource Management, Water	
		Water Harvesting: Provide swales and use permaculture techniques to collect water and allow for infiltration in landscape areas.		
		Permeable Materials: Install permeable materials for at least 65% of lot if lot is equal or greater than .25 acres. Use permeable paving materials for at least 50% of lot if lot size is less than .25 acres (check LEED).		
		Comparison of post-development stormwater runoff conditions with predevelopment conditions.		DWI metrics

	Surface Water Management (Public Areas):	Permeable Materials: Use water-permeable materials in 50 percent or more of walkways and in 50 percent or more of paved parking areas.		Green Communities Checklist
		Passive Stormwater Management: Stormwater will be handled wherever possible, as "green infrastructure" as a means of minimizing the cost of underground utilities. Methods include water harvesting swales, check dams, curb cuts, tree wells, etc (See Chapter 6, Section B, Part 2: Water Conservation, Collection, + Reuse). Water harvested in this way will be used to create green areas within the project.		DWI metrics
		Storm Water Discharge Rate: Post development peak discharge rate and quantity for 2-year 24 hour design storms less than pre development conditions.	VI-A-2 Landscape Architecture, Resource Management, Water	DWI metrics
	Construction Waste Management: Limit construction waste sent to landfill to max. 2.5 lbs/sf of construction.	Waste Reduction: Encourage creative methods of limiting solid waste disposal resulting from future development.	II-B-4 Community Planning, Resource Management, Materials	DWI metrics
	Recycling: Reduce by 50% the average lbs (2006 average x lbs/household) of household waste generated. No export of organic/compostable waste.	Recycling Program: Provide recyling bins to all households and connect to the city-wide recycling system.	II-B-4 Community Planning, Resource Management, Materials	
		Community Recycling Center: Locate and design a well-marked central collection and storage area for recycled materials with easy access for collection vehicles.	II-B-4 Community Planning, Resource Management, Material	DWI metrics
		Organic Material Composting: Provide recycle bins for central compost collection and/or composting bins for individual organic matter collection.		
	Wastewater Management: Reduce infrastructure costs by 30% through on-site treatment.	Alternative Wastewater Treatment Plant: Manage and treat wastewater on site in constructed wetlands (innovative wastewater) to enhance native landscape areas and reduce infrastructure costs.	II-B-2 Community Planning, Resource Management, Water	
		Treated Effluent: Install separate marked (purple) treated effluent lines and use treated effluent from an on-site treatment center for irrigating public open space landscape areas.	VI-A-2 Landscape Architecture, Resource Management, Water	

A food generation program will instill community pride and educate the community on the importance of healthy food and diet.	Food Generation: Produce x% of food on site for local consumption.	Community Garden: Identify locations for community gardens and develop a strategy for small scale farming education, food production and distribution.		
Integrating alternative transportation means will provide opportunities to reduce automobile trips and to create a sense of place through a connected, walkable community.	Access to multi-modal transportation systems (shared car, bus, public transportation)	Bus stop locations: Locate highest densities proximate to public transportation. Locate bus stops so 80% of residents are within a 1/4 mile walking distance along public trails of public transit service.	II-A-(1,2,3) Community Planning, Community Zones, (Center Zone, Neighborhood Zone, Rural Zone)	Green Communities Checklist
		Provide easy access to stops: Integrate location of stops along the trail system.	II-A-(1,2) Community Planning, Community Zones, (Center Zone, Neighborhood Zone) II-C-(3,4,5,6,11) Community Planning, Networks, (Bus Stops, Bike Lanes, Sidewalks, Trails, Public Space)	DWI metrics
		Pedestrian + Bike Trail System: Provide an interconnected trail system that connects to public spaces, connects the communities within the Northwest Quadrant, and connects to major trail systems on the perimeter of the property (see Figure 3-6).		
COMMUNITY				
Guiding Principles	Goals	Guideline	DS - location	
Plans developed through an inclusive public process, based on the constructive input, will reflect the goals and desires of the public and will obtain approval with minimum delays to the project.	Integrated Public Process:	Open public process for approvals: Address community concerns in each phase of the project to build community consensus and obtain planning commission + council approval	I-C Introduction/ Vision	
		Development Management: A philosophy and practice are in alignment with this program and will act as master developer will be identified through a public RFQ/RFP process.		
	Continued community stewardship and pride in upholding community goals and values.	Develop partnerships: Develop partnerships with community environmental groups to generate and sustain excitement, interest, and stewardship of the community.		
The success of the project depends on establishing the right management structure that can manage the project to realize the principles and vision of the community.	Management Structure	Management Structure: A non-profit developer will act as master developer to construct the base infrastructure and organize the sale of lots to individual builders.		

		Design Review: A design review oversight committee comprised of the right mix of experts and community members will review projects for conformance to the community vision and uphold the aesthetic vision.		
Creating a 'destination' in the NWQ community will connect it to the rest of Santa Fe and enhance the cultural richness and economic vitality of the community.	Creative Partnerships:	Education: Identify potential partnerships with groups such as the Community College and/ or other institutions to create an education-oriented 'destination'.		
		Cultural Partnerships: Incorporate historical, artistic and cultural components into the design of the 'destination' and the community.		
	Community Space	Public Space: Provide a range of public space areas for community gathering visible within the community and neighborhood areas. (natural preserve, parks, ridgetop park, community gardens, etc.).		
		Centers: Neighborhoods and the community as a whole should have clearly defined "centers" where residents are encouraged (naturally drawn to) to interact.		
		Event Planning: Include a community coordinator as part of the neighborhood group responsible for energizing and planning community events that align with the identity and vision of the community.		
		Community Orientation: Provide doorways, orientation, and major access on to designated pedestrian zone areas to promote community interaction.		
A neighborhood that is culturally, socially, and economically diverse will be representative of the larger Santa Fe area and will create an authentic and vibrant community.	Economic Diversity	Affordable Housing: Include 37% affordably-priced housing in conformance to the Santa Fe Homes Program and 33% moderately priced workforce housing.	I-(C,D) Introduction/ (Vision, Guiding Principles)	
		Integrate Affordable Housing: Integrate affordable housing with higher-priced homes (mixed income). Submit an affordable housing plan as part of preliminary and final plat approvals.	II-A-(1,2,3) Community Planning, Community Zones, (Center Zone, Neighborhood Zone, Rural Zone) II-E Community Planning, Character	

Road and trail networks and other community forms that promote connectivity between neighborhoods and people will promote a sense of community and create a place where people want to live.	Connectivity	Trail System: Provide an integrated trail network to internal and peripheral public open space areas with site amenities like benches and picnic tables to promote community interaction.		DWI metrics
		Encourage a reduction of vehicle trips per day from national average through the construction and use of the trail system.		DWI metrics
ECONOMICS				
Guiding Principles	Goals	Guideline	DS - location	
The long term success of the community depends on its financial feasibility and long-term economic viability.	Maintain Affordable Housing Stock	Affordable Housing: Ensure long-term affordability for affordable housing component (maintenance & operations) by partnering with a local non-profit affordable housing organization to manage and maintain affordability.	I-F Introduction/ Management	
		Offset project costs and maintain affordability through innovative funding/financing techniques and possibly a land lease.		
	Encourage economic generators	The project must be financially successful for the developer. If not, there is no reason to proceed with development. The plan should seek to minimize (or at least mitigate and anticipate risk) to insure the long-term financial success of the project.		
Mixed-use neighborhood centers within walkable distance to residences will enhance sense of place, create a cohesive and safe community, allow residents to meet daily shopping needs with fewer automobile trips, and contribute to the economic viability of the project.	Mixed Use Centers	Mixed-Use: Provide opportunities for mixed-use development over time as a feature of the neighborhood.	II-A-(1,2,3) Community Planning, Community Zones, (Center Zone, Neighborhood Zone, Rural Zone) II-E Community Planning, Character	Green Communities Checklist
	All aspects of the community should be linked with a network of walking trails.	Include sidewalks or suitable pathways within a multifamily property or single-family subdivision linking residential development to internal and external public spaces, open spaces and adjacent developments.	II-C-(4,5,6,11) Community Planning, Networks, (Bike Lanes, Sidewalks, Trails, Public Space)	Green Communities Checklist

		The plan should seek to help build community by the creation of clearly defined, walkable neighborhoods.	II-A-(1,2,3) Community Planning, Community Zones, (Center Zone, Neighborhood Zone, Rural Zone) II-E Community Planning, Character	
Quality construction and aesthetically pleasing buildings that harmonize with the natural setting will maximize the economic value of the community.				
Developers can be encouraged to develop sustainably by providing up-front cost savings and incentives.	Fast-track Approvals	Fast-track and streamline approvals for sustainable development housing (affordable and market alike) that exceeds community requirements for green building and affordable housing to offset green building costs with cost savings from faster approvals.		
"Right sizing" infrastructure for utilities and transportation through conservation and alternative development strategies will minimize impacts to the environment as well as enhancing the financial feasibility of the development by minimizing capital investment.	Efficient Infrastructure	Capital investment should be minimized by "right sizing" infrastructure and through techniques such as water conservation (which minimizes the piping requirements for both water supply and sewerage). Water harvesting from rooftops, roadways, and parking should also be considered to minimize the cost of infrastructure and water demand. The plan should be developed according to a water budget that guides decisions about landscape irrigation. Water reuse for irrigation purposes should also be considered.	I-(C,D,E,F,G) Introduction, (Vision, Guiding Principles, Sustainable Development, Management, Design and Review Process)	
		The road network should be designed in such as way as to minimize pedestrian/automobile conflicts.	II-C-(1,2,3,4,5,6,7,8,11) Community Planning, Networks, (Fire and Safety, Streets, Bus Stops, Bike Lanes, Sidewalks, Trails, Parking, Driveways, Public Space)	
ART				
Guiding Principles	Goals	Guideline	DS - location	
Design guidelines will create a framework for an artful neighborhood landscape that harmonizes with neighboring land uses and reflects the form, color, culture, history, art, and quirkiness of Santa Fe. This framework will ensure the development of a unique community that belongs in its setting, attracts new residents, enhances community pride, and has lasting aesthetic appeal.	Thoroughly understand the cultural systems and symbols relevant to the project location and integrate cultural design elements.	Honors history of land and archaeology.	I-C Introduction, Vision	

		Research thematic symbols relevant to the project.		
		Thoroughly understand the environmental systems at work in the project location.		
		Utilize timeless design principles from other periods in traditional or original ways.		
		Investigate artistic ways of dealing with snow storage, snow loading, monsoon rains, temperature change (freeze/thaw), sun angles, etc.		
		Document forms that have been traditionally associated with similar artistic intent		
		Determine the project theme(s) and conceptualize variations of elements within the theme(s) that will add interest		
		Analyze materials selection for their sensory properties as well as their technical capabilities		
		Script the movement of users through the space to determine key locations for direction and cues		
		Build library of materials for the project Survey use of materials in surrounding community. Require mock-ups of significant details/ materials		
		Actively involve art and the cultural community.		

NORTHWEST QUADRANT MASTER PLAN		
Proposed Water Conservation Measures		**11/1/08**
Proposed water using devices for residences	Indoor	Outdoor
Energy Star Appliances*	x	
Low flow faucets and showerheads (2.0 gallons per minute)	x	
Water heaters shall have a recirculation system with timer	x	
Hot water pipes are insulated	x	
Photovoltaic solar hot water conduits may be used	x	
Dishwashers to use no more than thirteen (13) gallons per load	x	
High energy washing machine (uses less than 25 gallons per load)	x	
Toilets shall be either dual-flush models or be designed to use no more than 1.6 gallons per flush	x	
Proposed water savings devices/conservation measures for residences		
Restriction on 1 washing machine per residence	x	
Restriction on 1 dishwasher per residence	x	
Xeric Landscapes		x
Only drip or underground irrigation allowed		x
Non-native grasses are prohibited		x
Advanced, Indirect and Indirect-Direct Evaporative Coolers are allowed, Refrigerated air is prohibited	x	
Storm water mgmt/rain barrel/harvesting		x
Gray water recapture for bathroom faucets and shower heads for lot irrigation	x	x
Community will independently monitor its water consumption for residential	x	x
Proposed water using devices for commercial	Indoor	Outdoor
Energy Star Appliances where applicable*	x	
Low Flow faucets (to be motion activated)	x	
Water heaters shall have a recirculation system and a timer	x	
Hot water pipes are insulated	x	
*Toilets shall be either dual-flush models or be designed to use no more than 1.6 gallons per flush	x	
Solar hot water conduits may be used	x	
*Dishwashers, where applicable, to use no more than 13 gallons per load	x	
Proposed water savings devices/conservation measures for commercial		
Storm Mgmt -Rain barrel/harvesting		x
Xeric Landscapes		x
Only drip or underground irrigation allowed		x

Non-native grasses are prohibited										x		
Community will independently monitor its water consumption for commercial									x	x		
Proposed water savings devices/conservation measures for commercial continued									Indoor	Outdoor		Page 2
Gray water recapture from bathroom faucets used for irrigation									x	x		
Evaporative coolers are prohibited; however compressed air conditioners are allowed									x			
Note: There is a preferred for non-water consuming businesses as follows: "Non-Water Consuming Business" means a												
business that does not use potable water in the manufacturing or provision of any products or services in the normal												
course of business, except as required for bathroom facilities and drinking water for the convenience of employees and												
customers of the business. Non-water consuming businesses include, without limitation, the following types of businesses:												
1. Dry goods retail establishments												
2. Business Offices												
3. Call centers;												
4. Research and development businesses;												
5. Educational facilities												
6. Fabrication facilities;												
7. Craft manufacturing; and												
8. Warehouse and storage facilities												
Proposed water using devices for parks, streetscapes and open space									Indoor	Outdoor		
Drip or under ground irrigation										x		
Cisterns where applicable										x		
Proposed water savings devices/conservation measures for parks, streetscapes and open space												
Xeric Landscapes										x		
No non-native grasses										x		

LEED®-ND

LEED for Neighborhood Developments Rating System - Preliminary Draft September 6, 2005

Presented by the partnership of the Congress for the New Urbanism, the Natural Resources Defense Council and the U.S. Green Building Council

comment solicitation is web-based, and while the comment period is open, it can be accessed at www.usgbc.org/leed/nd .

About the LEED-ND Corresponding Committee

As previously mentioned, the LEED-ND Core Committee does the day-to-day work of developing the rating system; a second, larger corresponding committee is also established for every LEED product. In this way, a wider group of experts and interested parties can stay updated and provide feedback. The LEED-ND Corresponding Committee is invited to comment on draft versions of the LEED-ND rating system and has the first opportunity to respond to the call for pilot LEED-ND projects. In addition, LEED-ND Corresponding Committee members receive minutes from LEED-ND Core Committee meetings and notification of LEED-ND events.

Readers of this document who are not already members of the LEED-ND Corresponding Committee are encouraged to join at this time. The LEED-ND Corresponding Committee is open to USGBC members and non-members alike, but there are different ways to join:

• USGBC members should go to www.usgbc.org and subscribe to the LEED-ND committee listserv through the individual site user account section of the website.

• If you are not a USGBC member, send an e-mail to nd@committees.usgbc.org stating that you'd like to join the LEED-ND Corresponding Committee.

USGBC, CNU, NRDC, and the LEED-ND Core Committee thank you for taking the time to review this draft. We sincerely appreciate your participation in developing LEED-ND.

DRAFT ONLY 9/6/05

POINT OVERVIEW

Title	Points	Percentage of total points
Location Efficiency (2 Prerequisites / 7 Credits / 28 Points / 25% of total points)		
Prerequisite: Transportation Efficiency	--	--
Prerequisite: Water and Stormwater Infrastructure Efficiency	--	--
Credit: Contaminated Brownfields Redevelopment	4	3.5%
Credit: High Cost Contaminated Brownfields Redevelopment	1	0.9%
Credit: Adjacent, Infill, or Redevelopment Site	3 to 10	8.8%
Credit: Reduced Automobile Dependence	2 to 6	5.3%
Credit: Contribution to Jobs-Housing Balance	4	3.5%
Credit: School Proximity	1	0.9%
Credit: Access to Public Space	2	1.8%
Environmental Preservation (5 Prerequisites / 11 Credits / 13 Points / 11% of total points)		
Prerequisite: Imperiled Species and Ecological Communities	--	--
Prerequisite: Parkland Preservation	--	--
Prerequisite: Wetland & Water Body Protection	--	--
Prerequisite: Farmland Preservation		
Prerequisite: Erosion & Sedimentation Control	--	--
Credit: Support Off-Site Land Conservation	2	1.8%
Credit: Site Design for Habitat or Wetlands Conservation	1	0.9%
Credit: Restoration of Habitat or Wetlands	1	0.9%
Credit: Conservation Management of Habitat or Wetlands	1	0.9%
Credit: Steep Slope Preservation	1	0.9%
Credit: Minimize Site Disturbance During Construction	1	0.9%
Credit: Minimize Site Disturbance Through Site Design	1	0.9%
Credit: Maintain Stormwater Runoff Rates	1	0.9%
Credit: Reduce Stormwater Runoff Rates	1	0.9%
Credit: Stormwater Treatment	2	1.8%
Credit: Outdoor Hazardous Waste Pollution Prevention	1	0.9%
Compact, Complete, & Connected Neighborhoods (3 Prereq / 22 Credits / 42 Points / 37% of total points)		
Prerequisite: Open Community	--	--
Prerequisite: Compact Development	--	--
Prerequisite: Diversity of Uses	--	--
Credit: Compact Development	1 to 5	
Credit: Transit-Oriented Compactness	1	0.9%
Credit: Diversity of Uses	1 to 3	2.6%
Credit: Housing Diversity	4	3.5%
Credit: Affordable Rental Housing	1 to 2	1.8%
Credit: Affordable For-Sale Housing	1 to 2	1.8%
Credit: Reduced Parking Footprint	2	1.8%
Credit: Community Outreach and Involvement	1	0.9%
Credit: Block Perimeter	1 to 4	3.5%
Credit: Locating Buildings to Shape Walkable Streets	1	0.9%
Credit: Designing Building Access to Shape Walkable Streets	1	0.9%
Credit: Designing Buildings to Shape Walkable Streets	1	0.9%
Credit: Comprehensively Designed Walkable Streets	2	1.8%
Credit: Street Network	1	0.9%
Credit: Pedestrian Network	1	0.9%
Credit: Maximize Pedestrian Experience	1	0.9%
Credit: Superior Pedestrian Experience	1 to 2	1.8%
Credit: Applying Regional Precedents in Urbanism and Architecture	1	0.9%
Credit: Transit Subsidy	3	2.6%

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Title	Points	Percentage of total points
Credit: Transit Amenities	1	0.9%
Credit: Access to Nearby Communities	1	0.9%
Credit: Adaptive Reuse of Historic Buildings	1 to 2	1.8%
Resource Efficiency (0 Prerequisites / 17 Credits / 25 Points / 22% of total points)		
Credit: Certified Green Building	1 to 5	4.4%
Credit: Energy Efficiency in Buildings	1 to 3	2.6%
Credit: Water Efficiency in Buildings	1 to 2	1.8%
Credit: Heat Island Reduction	1	0.9%
Credit: Infrastructure Energy Efficiency	1	0.9%
Credit: On-Site Power Generation	1	0.9%
Credit: On-Site Renewable Energy Sources	1	0.9%
Credit: Efficient Irrigation	1	0.9%
Credit: Greywater & Stormwater Reuse	2	1.8%
Credit: Wastewater Management	1	0.9%
Credit: Reuse of Materials	1	0.9%
Credit: Recycled Content	1	0.9%
Credit: Regionally Provided Materials	1	0.9%
Credit: Construction Waste Management	1	0.9%
Credit: Comprehensive Waste Management	1	0.9%
Credit: Light Pollution Reduction	1	0.9%
Credit: Contaminant Reduction in Brownfields Remediation	1	0.9%
Other (0 Prerequisites / 2 Credits / 6 Points / 5% of total points)		
Anticipated Accredited Professional Innovation Credit(s)	1 to 2	1.8%
Anticipated Innovation Credit(s)	1 to 4	3.5%
TOTAL	**114**	**100%**

Anticipated Certification Levels
(Percentages taken from the "LEED Product Development and Maintenance Manual")

Certified: 46 – 56 points (40% of total points)
Silver: 57 – 67 points (50% of total points)
Gold: 68 – 90 points (60% of total points)
Platinum: 91 – 114 points (80% of total points)

H. The Enterprise Foundation: Underwriting Green Communities

Green Communities:
Summary of Underwriting Criteria

(Full criteria with technical specifications will be provided in a supplement that will be made available in November and automatically emailed to all those who request this document via our website.)

A. Mandatory Items

Integrated Design Process

- Explore green development options in the design phase through a structured planning process using a multi-disciplinary team that includes at least one team member experienced in green design.
- Incorporate all Mandatory criteria items into a Green Development Plan with a minimum number of optional measures (see Section B, below). When working drawings are completed the project architect will certify that these Criteria have been met.

Smart Site Location

- Locate projects on sites with access to existing roads, water, sewers, and other infrastructure within or contiguous to existing development.
- Do not locate new development on wetlands, steep slopes, prime farmland or parkland.
- Locate projects within walking distance of community and retail facilities.

Walkable, Accessible Neighborhoods

- Include sidewalks or other suitable pathways within a multi-family property or single-family subdivision to encourage walking within and off the site.

Compact Development

- Average minimum density for new construction should be 6 units per acre for detached or semi-detached; 10 for town homes; and 15 for apartments.

Environmental Remediation

- Conduct a Phase I Environmental Site Assessment and additional assessments if required, then provide a plan for abatement of any hazards.

Erosion and Sedimentation Control

- Implement EPA Best Management Practices for erosion and sedimentation control during construction**.**

Water Usage

- Select trees and plants appropriate to the climate, including drought-tolerant species in regions with low levels of rainfall.
- Irrigate only with water efficient systems, captured rainwater or reclaimed water in areas with declared water shortages.
- Use appliances and plumbing fixtures that reduce water use and sewage

outflow; **OR**

If a rehab project, use low-flow toilets and showerheads and meet requirements for replacement of any other fixtures and appliances.

Energy Efficiency

- ❑ Demonstrate energy efficiency by meeting Energy Star standards or a HERS design score of 86**; OR**
  If a rehab project, demonstrate energy efficiency by implementing cost-effective energy improvements with a 10year payback or better as identified by a qualified engineer or energy auditor.
- ❑ Install individual or sub-metered electric meters in multifamily housing units (except zero-bedroom dwelling units).
- ❑ Install Energy Star labeled appliances and lighting fixtures.
- ❑ Install daylight sensors on all outdoor lighting.

Healthy Living Environment

- ❑ Use composite wood (e.g. particleboard) only if free of added urea formaldehyde.
- ❑ Use Carpet and Rug Institute's Green Label certified carpet in carpeted areas.
- ❑ Specify low-toxic, solvent-free, or low volatile organic compound paints, primers, sealers and adhesives.
- ❑ To ensure effective removal of moisture, install fans in bathrooms exhausting to the outdoors equipped with a humidistat sensor, low speed control or timer.
- ❑ Vent kitchen range hoods to the exterior.
- ❑ Do not install mold-propagating materials such as vinyl wallpaper and unsealed grout, in wet areas.
- ❑ Insulate cold water pipes in climates and building conditions susceptible to moisture condensation
- ❑ To avoid moisture problems, use tankless hot water heaters or install conventional hot water heaters so that overflow or leaks are captured by drains.
- ❑ Use highly durable, moisture resistant materials in tub/shower enclosures.
- ❑ Appropriately size HVAC systems to prevent short-cycling of heating or air conditioning and ensure adequate dehumidification.
- ❑ Provide proper drainage down to the lowest level of concrete and provide vapor barriers under all slabs.
- ❑ Provide surface drainage of water away from foundations.
- ❑ Ventilate air spaces under any floor slabs in Zone 1 radon areas.
- ❑ Provide a fan with a CO sensor for any enclosed garage space.
- ❑ Adequately ventilate all living areas by providing 15 cubic feet per minute of fresh air per occupant either via the HVAC system or through natural ventilation.

Owner and Resident Education

- ❑ Provide a plan for educating the owner regarding the intent of integrated Green building features as well as their proper use and maintenance
- ❑ For multi-family projects, provide a Green Home Guide for residents describing the intent, benefits, use and maintenance of Green building features.

B. Options that Must Total at Least:
25 Points for New Construction
20 Points for Rehabilitation

Additional Resource Conservation

- ❑ Locate the project on a grayfield, brownfield or adaptive reuse site. (10 points)
- ❑ Increase average density above the levels specified in the Mandatory Compact Development item. (5 points for an increase of at least 2 units/acre)
- ❑ Achieve reductions in the square footage of building envelope (outer walls and ceilings) as compared to the developer's most compact previous development of the same type. (5 points for each 5% reduction in envelope area for a maximum 15 points)
- ❑ Exceed Energy Star standards through passive or active solar energy features, super-insulation, or other methods. (5 points for each 5% additional savings for a maximum 15 points; **OR** *if a rehab project*, 15 points for adopting additional improvements that extend the payback period to 14 years or more)
- ❑ Install photovoltaic panels to provide at least 10% of the project's estimated electricity demand. (5 points, plus 5 points for each additional 10% increment up to a maximum of 15 points)
- ❑ Assure that at least 5% (by dollar value) of all newly-installed materials have some recycled content. (2 points, plus two points for each additional 5% increment, not to exceed 14 points)
- ❑ Install natural linoleum in kitchens and bathrooms or install bamboo floorings in living rooms and bedrooms. (5 points)
- ❑ Use at least 50% wood products and materials from salvaged wood, wood certified in accordance with the Forest Stewardship Council, or engineered framing materials. (10 points)
- ❑ Use water-permeable materials in 50% or more of walkways. (5 points)
- ❑ Use water-permeable materials in 50% or more of parking areas. (10 points)
- ❑ Install reflective or open-grid paving. (5 points)

Surface Water Management

- ❑ Capture the first ½ inch of rainfall that falls within a twenty-four hour period. (5 points)
- ❑ Label all storm drain or storm inlets. (2 points)

Walkable, Accessible Neighborhoods

- ❑ Locate center of development within a ¼ mile of public transit service or ½ mile from a fixed rail station. (5 points for rehab of an existing residential building; 10 points for other redevelopment, as defined above, or new construction)
- ❑ Provide at least 3 separate and remote connections to sidewalks or pathways in the surrounding neighborhoods. (5 points)

I. Funding Sources

FOUNDATION DIRECTORY

1. **The Bank of America**
   Donar: Bank of America Corp; Bank of America, NA; FleetBoston Financial Foundation
   Purpose and activities: The foundation supports organizations involved with housing. Special emphasis is directed toward programs designed to address critical issues in local communities.
   Community Development: The foundation supports programs designed to promote affordable housing, workforce development, and neighborhood revitalization.
   URL: http://www.bankofamerica.com

2. **Daniels Fund**
   Donar: R. W. Daniels, Jr.; Bill Daniels
   Purpose and activities: Giving for homelessness and self-sufficiency. The goal of the program is to ensure that homeless individuals and families achieve and maintain self-sufficiency. Focus is on the following: 1) Emergency Services; shelter, food and basic needs. 2) Transitional Housing with Supportive Services; transitional housing; employment programs, vocational training, child management, life skills training and employment
   URL: http://www.danielsfund.org

3. **The Ford Foundation**
   Donar: Henry Ford; Edsel Ford
   Purpose and activities: The foundation's mission is to serve as a resource for innovative people and institutions worldwide. Asset building and community development
   Community and Resource Development: 1)Environment and Development: help people and groups acquire, protect, improve and manage land, water, forests, wildlife and other natural assets in ways that help reduce poverty and injustice. 2) Community Development: seek to improve the quality of life and opportunities for positive change in urban and rural communities. The foundation supports community-based institutions that mobilize and leverage philanthropic capital, investment capital, social capital and natural resources in a responsible and fair manner
   Economic Development: 1) Development Finance and Economic Security: support organizations that help businesses create employment opportunities and help low-income people acquire, develop and maintain savings, investments, businesses, homes, land and other assets. 2) Work-force Development: support organizations that help improve the ways low-income people develop marketable job skills and acquire and retain reliable employment that provides livable wages.
   URL: http://www.fordfound.org

4. **The Frost Foundation, Ltd**
   Donar: Virginia C. Frost
   Purpose and activities: Focus Social services and humanitarian needs including homelessness; environment – consideration given to programs in action to conserve and protect the environment for the well-being and safety of plants, animals and human beings.
   URL: http://www.frostfound.org

5. **The Garfield Foundation**
   Type of grantmaker: Independent foundation
   Purpose and activities: Grantmaking priorities include sustainable production and consumption, biodiversity conservation, mercury source reduction and community revitalization.
   Application information: Contributes only to pre-selected organizations
   URL: http://www.garfieldfoundation.org

6. **The F. B. Heron Foundation**
   Purpose and activities: The foundation focuses its grantmaking and mission-related investing on five wealth-creation strategies for low-income families and communities. These five areas are: 1) access to capital; 2) quality and affordable child care; 3) comprehensive community development; 4) home ownership
   Access to capital: The foundation supports and invests in community development financial institutions (CDFI's)that serve low-income communities. CDFI's seeking the foundations support must have as their core work financintg home ownership. The foundation also funds practitioner associations that promulgate best practices, especially those helping CDFI's to track the social impact of their investments.
   Comprehensive Community Development: The foundation funds comprehensive community development organizations built around a strong core of the wealth-creation strategies on which the foundation focuses – i.e. access to capital, enterprise development, home ownership and quality and affordable child care. In addition, associations that assist community development organizations engaged in relevant wealth-creation strategies to build management and program capacity and to improve and demonstrate impact.
   Home ownership: The foundation will consider support for organizations working to increase home ownership in low and moderate-income urban and rural communities. The foundation is interested in organizations that develop and/or finance new or rehabilitated owner-occupied home, including self-help housing, that assist people with low-interest mortgage; or that provide pre- and post-mortgage counseling to first –time home buyers.
   URL: http://www.heronfdn.org

7. **W. K. Kellogg Foundation**
   Donar: W.K. Kellogg; W.K. Kellogg Foundation Trust; Carrie Staines Kellogg Trust
   Purpose and activities: supports children, families and communities as they strengthen and create conditions that propel vulnerable children to achieve success as individuals and as contributors to the larger community and society.
   URL: http://www.wkkf.org

8. **McCune Charitable Foundation**
   Donar: Perrine Dixon McCune: Marshall L. McCune
   Purpose and activities: The mission of the foundation is to memorialize its benefactors through grants which enrich the cultural life, health, education, environment, and spiritual life of the citizens of New Mexico. Primary areas of interest include the arts, education, youth, health, social services and environment.
   Fields of interest: Community/economic development; homelessness/shelter, development
   URL – http://www.nmmccune.org

9. **Charles Stewart Mott Foundation**
   Donar: Charles Stewart Mott Foundation
   Purpose and activities: To support efforts that promote a just, equitable sustainable society with the primary focus on civil society, the environment, the area of Flint, MI and poverty. The foundation makes grants for a variety of purposes within these program areas including improving the outcomes for children, youth and families at risk of persistent poverty; education and neighborhood and economic development.
   URL: http://www.nott.org

10. **Phelps Dodge Foundation**
    Donar: Phelps Dodge Corp
    Purpose and activities: The foundation supports organizations involved with education, environment, children and youth, family services, community development and economically disadvantaged people
    Community Development – training and development: The foundation supports programs designed to provide relevant slills and training to enhance the public workforce. Bring disadvantaged citizens into the economic mainstream
    URL: http://www.phelpsdodge.com/Community-environment/communityrelations/charitablegiving

11. **The PMI Foundation**
    Donar: PMI Mortgage Insurance Co
    Purpose and activities: Special emphasis is directed toward programs designed to create housing opportunities; and revitalize neighborhoods in communities.
    Civic and community: The foundation supports housing and economic development organizations
    URL: http://www.pmifoundation.org

12. **The Stocker Foundation**
    Donar: Beth K. Stocker
    Purpose and activities: Emphasis on short-term youth development programs; social service agencies offering solutions to specific problems such as homelessness.
    Community: Supports community revitalization efforts that promote sustainable practices and partnerships. Special preference is shown to organizations that possess a can-do attitude.
    URL: http://www.stockerfoundation.org

13. **Vaterstetten Foundation**
    Fields of Interest: Community/economic development; Foundations (community)
    Application information: Contributes only to pre-selected organizations

14. **Surdna Foundation, Inc**
    Donar: John E. Andrus
    Purpose and activities: Community Revitalization, which takes a comprehensive and holistic approach to restoring communities in America
    Community Revitalization: The program seeks to transform environments and enhance the quality of life in urban places, increase their ability to attract and retain a diversity of residents and employers, and insure that urban policies and development promote social equity.
    Environment: Fostering a population of environmentally informed, responsible, activist citizens; and respecting community and grassroots persectives.

SUSTAINABLE FUNDING SOURCES FOR GREEN DEVELOPMENT

1. Source: Arbor Day Foundation, and Forest Guardians, and the National Park Service and National Forest Service for Tree Planting Programs
2. Source: Enterprise Community Partners has a program in Los Angeles through Ed Norton, in which affordable homes can apply for free (or reduced costs) photovoltaics provided by a Los Angeles Photovoltaic company.
3. Source: Advice from Homework Group: Investigate Monte Sagrado (in Taos) and Oshara (in SFe) for H20 mining technologies for landscape irrigation that cost less than traditional waste H20 infrastructure/operation and maintenance, …reuse of landscaping H20 twice…. Utility runs water reclamation and is responsible for communities' water.
4. Source: Jan 07 Legislature passed new legislation, which is supposed to fund communities for Arts and Culture Districts, and Open Space tax breaks. Suby was told this by the NM Economic Development Department….but would need to produce further research for the actual legislation.
5. Source: Biologist Will Barnes and the Santa Fe Girl's School, 3 year Project to restore the Santa Fe River… they voluntarily have provided over 500 hours of work along the river for river habitat restoration, similar work could occur along the arroyos throughout the NWQ.
6. Source: www.cooltowninvestments.com: a $150 million fund to help developers create projects that are well designed city projects for the "creative class", over 1,100 projects described on the website. And a new www.cooltownbeta.com to help develop customers before projects are constructed.
7. Source: Park Volunteer Program as established at Rail Yard Park with Parks Director Fabian Chavez
8. Source: City of Santa Fe Incentive programs
9. Source: Real estate transfer tax – for affordable units, green standards required
10. Source: Enterprise Community Partners and Others Loan Pool for Vertical Construction Costs – 1% to 5% with set of standards – green required
11. Source: Los Alamos National Bank, Description: Sustainable Banking, Commercial Projects. $50 million in special financing to fund Land Development and Construction Projects that incorporate sustainable development strategies such as effective energy management, water conservation and pollution prevention.
12. Source: Enterprise Community Partners, Description: Green Communities: In partnership with the Natural Resource Defense Council in creating 400 million in funds for smart growth, energy and water resource management and sustainable building technologies. Grants are awarded up to $50,000. Grant money for "green charrettes" available up to $5,000. Financing Tools available.
13. Source: Eco Media, Description: EcoZone: Eco Media brings together city and state governments with corporate partners to address environmental projects. The EcoZone program's public-private partnership supports ongoing and new environmental projects – at no additional cost to taxpayers. Past projects have included: storm drain catch basin filtering, hybrid and alternative fuel vehicle for municipal fleets, solar paneling on city facilities, greening industrial lots into green space. Funding also can be directed to public education and outreach programs.
14. Source: Fundinggreenbuildings.com / The McAdams Group, Description: Service offers a Funding Green Building Tool Kit, which includes: Access to five on-line seminars that include: Federal and State Tax Credits, Funding magnets, Agencies, Presentation tools, Recognition tools, Securing Donations and Revenue Sources for green buildings. Tool Kit includes access to documents and monthly attendance to "Funding Fridays" teleconferences. Cost: $495/person

15. Source: Bridgemer: Funding and Investing in Green Buildings, Description: This Investment Group invests in real estate projects that utilize green building technologies. Sources of capital are available to provide debt and equity finance for green buildings.
16. Source: The Kresge Foundation, Description: The Kresge Foundation encourages nonprofit organizations to consider building green. They offer education resources and workshops and special grants to help nonprofits during the planning phase. Grant guidelines in this program encourage environmentally focused organizations to innovate, creating new models of sustainable design. Planning grants are available in amounts from $25,000 to $100,000.
17. Source: The National Association of State Energy Officials (NASEO), Description: The NASEO is the only nonprofit organization that represents the Governor-designated energy officials from each state and territory. The organization was created to improve the effectiveness and quality of state energy programs and policies, provide policy input and analysis, share successes among the states, and be a repository of information on energy issues of concern to the states and their citizens.
18. Source: Tax Incentives Assistance Project (TIAP), Description: The Tax Incentives Assistance Project (TIAP), sponsored by a coalition of public interest nonprofit groups, government agencies, and other organizations in the energy efficiency field, is designed to give consumers and businesses information they need to make use of the federal income tax incentives for energy efficient products and technologies passed by Congress as part of the Energy Policy Act of 2005.
19. Source: Smart Communities Network (Center of Excellence for Sustainable Development – funding), Description: Site lists current funds available for green building projects. Examples include: Alcan Sustainability Prize, Bank of America Neighborhood Excellence Initiative, EPA funds, DOE grants. See website for current listings.
20. Source: Suggestions for making the provision of affordable housing at NWQ by private developers feasible:
21. Source: Implementation of a Real Estate Transfer Tax to fund affordable housing:. Description: Funds from such a tax would fund affordable housing programs throughout the city. This setup would allow the burden of providing affordable housing to be spread evenly across all homebuyers, rather than having the buyers of market rate housing in a given development shoulder all of the burden. A current proposal before the state calls for a 1% transfer tax, but it only applies to homes priced above $500K.
22. Source: Implementation of a Charitable Contribution Tax Credit for Affordable Housing. Description: This provision would allow developers to offset taxes on capital gains or real estate operations in other developments by deducting charitable contributions made toward affordable housing programs at NWQ or other areas within Santa Fe. For example, a developer who has significant real estate profits and tax liability stemming from projects elsewhere in SF (or in Denver or Dallas or wherever) would be able to reduce his tax liability by making a charitable contribution to the City of Santa Fe to fund affordable housing initiatives.

J. References

Design Standard References

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City of Santa Fe. Santa Fe Railyard Master Plan and Design Guidelines. (May 2002).

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Los Alamos National Laboratory. Site Development Standards. (September 2006).

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Glossary References

American Insitute of Architects Potomac Valley. Glossary. (2004). http://www.aiapvc.org/glossary.htm

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City of Ottawa. Urban Design Guidelines for Greenfield Neighbourhoods. Planning (2001-2008). www.ottawa.ca/residents/planning/design_plan_guidelines/completed/greenfield/glossary_en.html

City of Vancouver. Operational Guidelines for Community Gardens on City Owned Land other than City Parks. Social Planning (2008). http://vancouver.ca/commsvcs/socialplanning/initiatives/foodpolicy/projects/pdf/commgardensguide.pdf

City of Santa Fe. Santa Fe Housing Needs Assessment. Office of Sustainability (May 2007).

New Mexico Department of Agriculture. Report on the Galisteo Basin. (2008).